



Job Description

Account Consultant-Receptionist

Office Locations: NYC

Position Reports to: Manager, Sales Operations

Approval Date:

Summary of Position

Savoy is an innovative benefits consulting firm and general agency. With over 30 years' experience, Savoy's strategic partnerships bring continued growth to brokers, carriers and vendors. Savoy tactically provides best-in-class products and services including comprehensive health and specialty benefits, compliance, HR services, technology solutions, research, education and other employer-related services.

Key Objectives

- The performance objectives of this position are focused on professional development of the candidate and an underlying assumption that the candidate's primary goal is to assist with the growth of Savoy business in emerging markets. The candidate must be detail oriented, flexible, able to work independently, have excellent problem solving and communication skills.

Job Responsibilities

Sales Team Support – the candidate will:

- Present and participate in presentations to existing and prospective new brokers.
- Strategize on sales situations and facilitate solutions to complex problems.
- Support broker partners with sales/enrollment meetings – both onsite and remotely.
- Assist with the overall growth of New York.

Case Installation and Renewal Submissions – the candidate will:

- Coordinate full RFP procedure with brokers and carriers. Identify cross-sell opportunities. Become familiar with broker preferences and sustain exceptional partner and carrier relationships.
- Become well versed in various quoting software and handle all small group quote requests. Maintain the quote tracker and provide a summary to Manager, Sales Operations on a weekly basis.
- Be the expert on all carrier products for all lines of coverage in the New York and Connecticut markets. Communicate internally and with the broker community regarding products and procedures.
- Handle case installations and renewal changes, including scrubbing paperwork for accuracy and obtaining all missing information prior to carrier submission. Handle front line communication with brokers while setting proper expectations.
- Oversee all carrier submission and installation requirements. Maintain submission tracker of all cases throughout the set-up process. Ensure all carrier checklists and forms are up-to-date and saved on all applicable shared drives.
- Update and maintain new case and renewal submissions in internal database.

Service Support – the candidate will:

- Process service requests for existing cases (e.g., member enrollments/terminations, claims/billing inquiries).
- Escalate issues to Manager, Sales Operations and Account Executive when necessary.
- Handle basic administrative duties.
- Complete other various projects as assigned.

Position Qualifications

- Proficient in Microsoft Office, especially Excel and Outlook.
- Strong communication skills: written and verbal.

Position Requirements

- Applicant must sign an Employee Confidentiality, Non-Competition and Non-Solicitation Agreement.
- Applicant must provide an Application for Employment.
- BA/BS preferred but not required.
- 2-5 years' experience in group health insurance.
- NY/NJ Life, Accident and Health license required.

Candidate Development

- Performance reviews will be performed annually
- Opportunities for advancement will be based upon merit and exemplary results against business objectives

Direct Report Signature: _____

Date: _____

Employee Signature: _____

Date: _____