



Job Title: Employee Benefits Account Executive
Department: Employee Benefits Team
Reports to: Employee Benefits Team Leader
Salary Range: \$24-\$29/hr with \$5K Corporate Growth Incentive Tier

Role objectives:

We are a national, multi-line brokerage agency that provides dedicated support and innovative resources to those who provide financial solutions and employee benefits to families and businesses.

Our Employee Benefits Administrator is a motivated, forward-thinking individual who nurtures relationships with KAFL's core values in mind. We work as a team and take pride and ownership of being a trusted partner to our clients.

Responsibilities:

The Employee Benefits Account Executive role includes and is not limited to:

- Work alongside Regional Sales Representative on lead opportunities.
- Identify customer needs through discovery conversations, with the ability to tie customer needs to a specific product.
- Manage the entire sales/buying process including qualification, solution development/presentation, negotiations, and close.
- Maintain book of business and conduct renewal reviews with customers.
- Conduct/facilitate open enrollment meetings as necessary.
- Identify cross-sell opportunities on in-force cases and facilitate sales/buying process.
- Orchestrate resources both internally and externally throughout the sales and renewal process.
- Develop long-lasting relationships with agents, prospects, and customers.
- Maintain a high retention rate on in-force business.
- Schedule periodic check-in agents.
- Stay up-to-date on industry and job-related trends and standard methodologies, including reading relevant publications, articles, blogs, etc.
- Maintain customer service in-box on a rotational basis and act as a backup when needed.



Skills:

Strong Organizational Skills: Organization and persistence are valuable assets. Recognizes what needs to be done in order to achieve identified goals. Structures time and prioritizes to meet objectives in a high-volume environment.

Teamwork and Collaboration: Contributes to the efforts of the organization as a team player. Works with KAFL Employee Benefit team to identify and capitalize on opportunities. Has the ability to work in a high-energy, dynamic, and team-oriented environment.

Strong Interpersonal and Communication Skills: Comfortability with all forms of communication - written, verbal & face-to-face. Ability to present information confidently in small and large groups.

Business Acumen: Has a sense of ownership, and drives positive results. Understands when to leverage resources and fiscal responsibility. Is a self-starter and able to work independently with minimal supervision.

Adaptability: Ability to adapt to a changing environment and systems. Able to prioritize and work well under pressure.

Learning: Passionate about learning and has a growth mindset. Strong problem-solving skills.

Entrepreneurial Mindset: Ability to grasp and understand business concepts and challenges. Ability to provide guidance and leadership qualities.

Qualifications:

- Previous experience in the employee benefits field with 3-4 years of sales experience
- Undergraduate degree or equivalent experience required
- Proficiency with Microsoft 365 & PowerPoint

Our Core values we live by:

Integrity: Our unwavering ethical principles mean you have a partner you can trust.

Respect: Promoting appreciation and cooperation, making it easier to achieve our common goals.

Accountability: Creating a sense of ownership and responsibility, producing impeccable results.

Innovation: Pushing for better ways to serve our advisors.

Collaboration: Believing in the power of working together to win together.