



Job Title: Senior Account Manager & Team Lead
Department: Employee Benefits
Reports to: Director of Employee Benefits
Salary Range: \$75,000 – \$100,000, and profitability bonus opportunity

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 Manager 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 Senior Account Manager role includes and is not limited to:

- Hire, coach, train, mentor and galvanize the Account Managers to provide them with peace of mind in their roles.
- Oversee day-to-day Account Management activity and evaluate team capacity on an ongoing basis.
- Work alongside Operations Lead on department volume and redistribution of Account Manager's workload.
- Identify customer needs through discovery conversations, with the ability to tie customer needs to a specific product.
- Maintain book of business and conduct renewal reviews with customers.
- Conduct/facilitate open enrollment meetings for an assigned accounts as necessary.
- Coordinate, configure and test and maintain enrollment technology portals for your assigned accounts 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 90% or higher retention rate on in-force business.
- Schedule periodic check-in with agents and KAFL direct clients.
- 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
- Adherence to Internal Documentation Requirements
- Teamwork and Collaboration
- Strong Interpersonal and Communication Skills
- Business Acumen
- Adaptability
- Openness to Learning
- Entrepreneurial mindset
- Ability to work in a high-volume environment.

Qualifications:

- 2+ Years in a managerial role.
- 10 + years of employee benefits experience, including ancillary benefits.
- 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.