

California's Valued Trust

JOB DESCRIPTION

Position:	Account Manager
Reports To:	Director of Business Development and Account Management
Status:	Full Time
Classification:	Exempt

Position Summary

Under the general direction and supervision of the Director of Business Development and Account Management (DBDAM) , the Account Manager is responsible for overall retention of existing districts/units within an assigned territory through consultation, service and education with union representatives, bargaining specialists, school district staff, chapter leadership, and members. The Account Manager supports new and ongoing sales activities and makes recommendations about new business opportunities.

Essential Duties:

- Act as the liaison and provide telephone and face-to-face assistance to subscribers, districts, and providers
- Communicate, in detail, the information in the Trust By-laws, Participation Agreement, and annual contracts to labor and management representatives
- Communicate, in detail, plan benefit features to labor and management representatives
- Educate bargaining and district representatives about the Trust and its benefit plans
- Develop and implement, with approval from the DBDAM, a district and labor visitation/service schedule to ensure a high level of service and visibility of the Trust
- Work with provider representatives, as needed, to explain the provider networks and programs offered through the Trust to district and labor representatives
- Communicate to the DBDAM the status of negotiations of school districts considering participation in the Trust
- Establish and maintain effective working relationships with labor, staff, and management representatives in territory
- Establish and maintain effective working relationships with provider representatives
- Conduct on-site presentations and educational meetings to new and existing districts and subscribers regarding the Trust and the benefit programs offered
- Conduct training for district personnel on Trust policies and procedures
- Use Business Contact Management tools and systems, and update relevant information in these systems
- Facilitate the development of meaningful business and sustainable school district and union relationships

- Attend and present at prospect meetings and customer meetings with other company staff members as necessary to perform duties and aid business development
- Attend training to develop relevant knowledge, techniques and skills
- Assist the DBDAM in developing and updating educational/informational presentation materials
- Attend chapter and leadership conferences and the annual meetings of the unions, including CTA, CSEA, ACSA, CSBA, and CASBO, as directed by the DBDAM
- Prepare and deliver oral presentation and written proposals
- Process necessary paperwork for new districts participation in the Trust
- Communicate details of selected programs to Member Services staff
- Prepare monthly reports regarding new districts participating in the Trust and field visits, meetings conducted, and information sent to existing and possible new entrants to the Trust
- Prepare and maintain up-to-date district and union contact files, lists, and database and communicate changes to CVT staff
- Assist DBDAM and Account Services Representative with special projects as needed
- Update and maintain district and union contact database
- Respond to requests for plan benefit information, rate requests, and proposals
- Process MOUs and Service and Participation Agreements for new districts
- Coordinate annual mailing of Service Agreements and fair market value information
- Assist in identifying technology needs and implementing technology solutions for the DBDAM department
- Assist in developing and maintaining accurate procedures manuals for the DBDAM position and department
- Performs related duties as required

Minimum Qualifications

Education:

- BA or BS degree in Business Administration, Communications, Marketing or other comparable program preferred; applicable work experience may be considered in lieu of degree
- CEBS designation preferred
- Coursework or exposure to insurance field

Experience, Skills & Abilities:

- Two to four year's experience in the health insurance field
- Strong knowledge of insurance language and benefit programs
- Ability to understand and explain in detail the Trust's By-laws, Participation Agreement, annual contracts, and plan benefits to labor and management representatives
- Ability to communicate, verbal and written, effectively to convey complex information in a variety of settings
- Excellent public speaking skills

- Ability to conduct presentations to large and small groups
- Excellent organizational skills
- Ability to act independently and organize and manage time efficiently
- Good aptitude for mathematical calculations

Miscellaneous:

- Required to work irregular hours, evenings, and weekends when necessary, without additional compensation
- Will travel locally, statewide, and nationally, if required. Will receive reimbursement for actual mileage at the current IRS approved mileage rate
- Travel is required at least 65-75% of the time
- Required to maintain and submit an accurate monthly expense account with proper documentation

License Requirements:

Possession of a valid Class C California driver's license. An incumbent must be insurable/bondable at the "standard rate" by the insurance carrier at all times while employed as an Account Manager.

Confidentiality:

Requires adherence to established policies on confidentiality of records and other information available through employment with the Trust.