



## **JOB DESCRIPTION BENEFITS CONCIERGE**

**Reports To:** Client Operations Manager

### **General Description:**

The Benefits Concierge will be responsible for assisting the company's customers and members in various ways through inbound, outbound calling campaigns and a chatroom. This role will be required to contact potential and existing customers by phone to inform them of company, customer, carrier products, services and offerings. This position will also have the responsibility to close sales and upsell on a regular basis. In addition, the role will require facilitation and coordination of communication between members, family members, and customer staff effectively through telecommunication.

This is a non-exempt, hourly/hybrid schedule position and will generally be remote with limited in-office attendance/requirement.

### **Key Responsibilities:**

- Assist customers and members in a branded, friendly, proactive and efficient manner with appropriate follow-up as necessary;
- Schedule follow-up sales appointments;
- Sell benefit policies from multiple carriers;
- Obtain member's addresses, contact details, insurance information, and medical histories;
- Update and verify member information at every visit;
- Adherence to call scripting and key performance metrics to achieve highest customer satisfaction;
- Reduce employee stress by assisting members in filling out carrier, customer, employer documents, when necessary;
- Improve carrier relations by communicating carrier provided resources and timely outreach;
- Assist with employee/member engagement by being an OnDemand information resource;
- Answer, investigate, and/or direct customer/member inquiries or complaints to the appropriate team member;
- Enroll members in a variety of insurance products;
- Follow up with members/customers to ensure their inquiry or complaint was satisfactorily resolved;
- Support internal business units during periods of high demand.

### **Minimum Requirements**

- High School Diploma;
- Experience working in call center type of environment;
- Ability to work in a fast-paced environment and demonstrate exceptional multitasking abilities;

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- Knowledge of Medicare and insurance products is preferred;
- Eligible and/or willing to become a licensed agent as well as certified in different insurance products;
- Prior telesales or telemarketing is a plus;
- Professional manner and appearance;
- Professional and pleasant phone etiquette;
- Strong interpersonal and communication skills;
- Meticulous attention to detail;
- Proficient in Microsoft Office Suite (Word, Excel, Outlook, and Access).