

## **BENEFIT ANALYST**

**DEPARTMENT: EMPLOYEE HEALTH & BENEFITS**

**STATUS: NON-EXEMPT**

**REPORTS TO: CLIENT SERVICE EXECUTIVE**

### **SUMMARY**

Work directly with Client Service Team (Client Managers, Client Executives and Principals) to provide a high level of client support in response to routine client requests and needs, act as liaison with carriers, and maintain client and carrier information.

### **ESSENTIAL DUTIES & RESPONSIBILITIES**

Support the Client Service Team with the renewal process.

- Gather client census data, current / renewal plan design and rate information, historical claims experience data, and any additionally related materials required to prepare RFP for client renewals and prospective groups.
- For specifically assigned clients, provide Benefit Service Associates with RFP information and respond to questions for clarification if needed. For all other client RFP's, follow processes and procedures to market clients for renewal process.
- Analyze market proposals received to verify benefits, premium rates and competitiveness.
- Finalize and maintain client and carrier spreadsheets in accordance with internal requirements and client requests.
- Prepare and coordinate materials for the enrollment process and other formal client presentations.
- Work with carrier representatives to coordinate activity for a smooth implementation of new plans.
- Coordinate Administrative Installation with insurance carrier and participate in installation meetings.
- Maintain Agency Management System and the ImageRight System.
- Follow processes and procedures as outlined in the Procedure Manual.

Provide day to day client service

- Act as liaison for client to research and resolve coverage, claim and administrative problems.
- Respond to client and carrier questions in a timely manner, requesting assistance from others on the Client Service Team if needed.
- Ensure the client data is accurate and current upon each renewal and throughout the policy period.
- Prepare files and other records needed by Marsh & McLennan.
- Develop good relationships with others on the Client Service Team.
- Maintain the professional standards established by Marsh & McLennan when working with clients.
- Provide back up to other Benefit Analysts as needed.
- Share information with Benefit Analysts and others to create a good network of information within the Department.
- Attend monthly Analyst meetings and other meetings as requested.

## **EDUCATION AND/OR EXPERIENCE**

Successful candidate will be a service oriented individual with high personal standards and a hands-on work style. This position requires an individual who is comfortable working at a varying pace, managing multiple tasks and deadlines simultaneously, adjusting priorities often, and managing frequent interruptions.

This position interacts with and provides service to internal associates and has contact with external vendors. The Benefits Analyst must be positive and approachable, and work effectively with diverse personalities. In addition, the following is required unless otherwise noted:

- Must possess a basic understanding of health and welfare plan benefits and carriers acquired through 3 years of experience providing group health and benefits service preferably at a brokerage or carrier or performing in a benefit specialist role with a Human Resource department of a large corporation.
- Bachelor degree strongly preferred.
- Maintain a valid, unrestricted State of California Life & Disability License and meet the continuing education requirements.
- Maintain a valid Driver's License and dependable transportation.
- Proficiency with Microsoft Word, Excel and PowerPoint to include professional work experience creating tables, charts, graphs, pivot tables and formulas.
- Math skills are required to perform basic arithmetic, calculate percentages and amounts based on a percentage increase/decrease
- Above average analyzing, problem solving and planning/organizational techniques are essential.

## **WORK ENVIRONMENT & PHYSICAL DEMANDS**

- Ability to use computer keyboard and sit in a stationary position for extended periods as well as the use of office equipment such as fax and copy machines, and telephones.
- Work is performed in a typical interior/office work environment.
- Occasional travel to client sites may be required. Travel is usually within driving distance.