

Senior Account Executive

The Role:

This position will play the critical role of lead consultant and strategist with our largest, most sophisticated clients in the advisory space. You will drive plan design and are ultimately responsible for client satisfaction. You will also partner with Executive Leadership Team to acquire new clients and grow relationships with current ones. This role is extremely visible, and provides the opportunity to leverage one's client, executive, business development, and benefits skills with one of the leading benefits advisory firms.

The Specific Responsibilities:

- Proactively drive discussions around plan performance and design:
 - Monitor trend and make recommendations to improve effectiveness of employee [benefit](#) program/design
 - Lead the marketing process
- Collaborate with Executive Team Producers [on](#) new client acquisition by serving as the client service contact in prospect discussions, and leading the RFP/value proposition process
- Play a key role in growing relationships with clients by recommending enhancements to benefit plan or broader rewards program design
- Proactively advise clients around client service issues; develop and implement processes and policies to improve overall client service
- Oversee development, preparation, [and execution](#) of Requests for Proposal
- Develop and lead open enrollment process including communications strategy, collateral development, vendor implementation, and conducting open enrollment meetings
- Develop and execute project plans, coordinate with team members for delivery on client projects, and ensure delivery against project goals
- Work to ensure completion of reports and administrative actions for clients such as compliance filings, policy review and delivery, SPDs, etc.
- Compile and analyze analytics, reports, utilization data and performance metrics and determine when some level of intervention or action is necessary with Executive Team
- Maintain and cultivate strong carrier & vendor relationships
- Mentor and develop junior colleagues
- Work collaboratively with the team to meet agency goals and contribute significantly to make continuous progress on [agency wide](#) KPIs
- Understand, articulate, and implement key DSG value-added resources and intellectual capital; contribute to development [ment](#) of new tools and approaches

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The Requirements:

- Possess Intermediate to Advanced knowledge of MS Office Tools (Excel, Word, PowerPoint, Publisher, Outlook) and software and current internet technologies.
- Excellent interpersonal skills; strong oral and written communication skills; ability to speak professionally and comfortably in front of others.
- Demonstrated ability to multi-task [and](#) prioritize work without constant oversight
- Willingness to work to meet client needs beyond scheduled hours by watching e-mail activity and answering important e-mails and calls after hours and on weekend, if necessary.
- Ability to travel to meet client service needs.
- Ability to service our clients, vendors, and co-workers effectively through problem solving, appropriate confidentiality, diplomacy, sensitivity, and tactfulness

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- Ability to be pro-active and autonomous, when necessary. Does not have to be asked or reminded of tasks. Takes responsibility for overall **client** retention and satisfaction as well as project completion.
- Demonstrates a leadership role with the client in the overall administration of the Benefits Program.
- **Mastery level knowledge of fully-insured benefits products, services, market dynamics, carriers/vendors**
- **Mastery level knowledge of self-insured benefits programs and products, services, market dynamics, carriers/vendors**
- **Strong level knowledge of ACA, Compliance, and Regulations**
- **Functional knowledge of wellness programs (both carrier based as well as proprietary/client specific strategies) and client advocacy concepts**
- Professional Certification (CEBS, GBA) *preferred*
- **Functional level knowledge of human resource management (PHR, SPHR) a major plus**
- Ability to work independently and on a team
- Functional knowledge of AgencyBloc is a major plus
- Functional knowledge of HubSpot is a major plus
- Functional knowledge of Asana is a major plus

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Education And/or Experience

- Education: Bachelor's Degree Preferred
- Maintain Group 1 License
- Demonstrated participation (i.e. completed segments) in RHU, GBA or CEBS CE path (Preferred)
- 10+ years of strategic health and welfare strategy and account management experience for large, complex, TX based clients (*experience also with multi-state clients preferred*)
 - Experience with a carrier, employer, or Broker may also be considered.
- Bilingual Spanish a *major plus*

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DSG is a leading advisory, broking and solutions company that helps clients turn risk into a path for growth.

DSG designs and delivers solutions that manage risk, optimize benefits, cultivate talent, and expand the power of capital to protect and strengthen institutions and individuals.

DSG's unique perspective allows us to see the critical intersections between talent, assets and ideas – the dynamic formula that drives business performance. Together, we unlock potential.

Learn more at www.dsgbenefits.com

DSG Benefits Group, LLC is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to, among other things, race, color, religion, sex, sexual orientation, gender identity, national origin, age, status as a protected veteran, or disability.

Equal Employment Opportunity: Know your rights.