



INTERCARE

Job Posting  
Account Executive  
San Diego office

In the Account Executive role, the successful candidates will develop, manage and expand relationships with employee benefit clients. Responsibilities will include:

- Manages assigned book of business, develops client relationships and delivers to grow and retain clients.
- Partners with sales team to develop and implement client's benefits strategies.
- Prepares a plan for each account to identify what and how short and long term needs may be met.
- Interfaces with the client at both the HR Manager/Director as well as the C-Suite level to understand the customer's overall objectives and requirements.
- Maintains regular interactions with clients to develop client relationship as well as advises of new product and service offerings and obtain feedback on Intercare's performance.
- Ensures all of Intercare's services are implemented according to established project plans and all client deliverables meet quality standards.
- Acts as the "quarterback" directing the account team, which may be comprised of an Account Representative(s) and Benefit Analyst(s) on all client work and deliverables.
- Ensures account team is executing deliverables according to Intercare's standards and best practices.
- Coaches and mentors the account team and provides direction to the team on:
  - RFP and marketing process, including which carriers to include in marketing and negotiating rates with carriers
  - Strategies for new and renewing plans
  - Pre-renewal and renewal timelines, project plans, meetings and presentations
  - Working with clients to identify the possibility of wellness initiatives; pulls in the Wellness Consultant/team to develop alternatives, determine specific plans and implement
  - Offering and implementing all of Intercare's value added services
  - Developing client's eight quarter strategy as well as the annual planning calendar and ensuring successful execution
  - Compliance requirements and issues, including SPD wrap documents and 5500 filings
  - Client's reporting requirements
  - Carrier and vendor management
  - Communications
  - All aspects of executing Open Enrollment
- Serves as highest point of escalation for issues or activities that the customer encounters with benefits programs and services.
- Prepares and conducts financial, technical and product presentations and demonstrations.
- Participates in Intercare sponsored events and promotes Intercare's services and initiatives.
- Provides feedback to sales, account management and marketing teams for future service enhancements.

- Shares ideas and customer needs throughout all phases of service life cycle (plan, design, integrate, install, manage).
- Contributes to the quarterly and annual business forecasting by providing account trends and sharing future client needs.
- Keeps current on changes in legislation impacting employee benefit programs and communicates with clients on these changes.

To perform the job successfully, an individual should demonstrate the following competencies:

- Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions.
- Project Management – Able to develop and manage project plans; Communicates changes and progress; Completes projects on time and budget.
- Customer Service - Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.
- Industry Knowledge – Strong knowledge of employee benefits products and services and how they are delivered to clients; knowledge of related legislation such as COBRA and HIPAA
- Analytical – Evaluate numerical and qualitative data to recommend the best alternatives to clients.
- Computer Skills – Use of Microsoft Word, Excel and PowerPoint to create effective presentations and exhibits.
- Relationship Management –Develop and maintain strong client relationships; work effectively with insurance and service vendors to gain cooperation in meeting clients' needs.
- Team Player – Effectively works with Intercare team.

Qualifications/Requirements:

- Bachelor's degree required.
- At least 5 - 7 years of related experience and/or training; or equivalent combination of education and experience. Preference will be given to candidates with brokerage or insurance carrier account or sales management experience.
- Must hold a valid CA Life Agent license or will obtain.
- About 25% travel may be required to meet with clients and for other outside events.

If you thrive in a fast-paced environment and enjoy creative and challenging work, Intercare may be the company for you! Intercare Insurance Solutions is looking for success minded, team oriented individuals who want to join a dynamic and growing company. Intercare is results-oriented and focused on providing excellent service and measurable value to our clients.

Intercare Insurance Solutions' model provides unparalleled customer service aimed at achieving the highest levels of client satisfaction and offers a wide array of additional services beyond those of the traditional insurance broker. Our forward-thinking culture has enabled Intercare to become one of the fastest growing corporate insurance companies in the West, providing insurance brokerage, employee benefits consulting, and risk management services to our clients. Intercare provides its clients with insurance solutions that are targeted, detailed and customized according to corporate, financial and human resources objectives.

For additional information about Intercare Insurance Solutions, please visit our website at [www.intercaresolutions.com](http://www.intercaresolutions.com). In addition to highly competitive compensation packages, Intercare also offers a comprehensive benefits package for our associates and their families, which includes medical, dental, life and disability, retirement, etc. For consideration, please

submit your resume and cover letter referencing job #039LK to [careers@intercaresolutions.com](mailto:careers@intercaresolutions.com). Intercare Insurance Solutions is an Equal Employment Opportunity employer.