

## Account Coordinator, Worksite

### Job Summary

The Account Coordinator helps grow Worksite sales by building and enhancing agent relationships. This individual proactively seeks to recruit and onboard new agents via outbound calls and by following up on potential leads. To provide additional value to the agent and case experience, the account coordinator oversees the overall sales process and maintains client relationships through working directly with agents, agencies, plan administrators and potential policy holders by communicating directly with existing and prospective clients, across different platforms, to find out about their needs and make follow up calls to see if those needs have changed. This individual possesses comprehensive product knowledge that enables matching clients with the right products. The account coordinator performs product presentations to assist with training and developing agents. This position reports directly to the Assistant Vice President, Life and Worksite Sales.

### Primary Responsibilities

- Grow New and Existing Sales
  - Work closely with assigned Regional Sales Manager to help recruit and onboard new agents through recruiting and sales activities, outbound calls and emails, and other inbound recruiting leads
  - Enhance new and existing relationships with Illinois Mutual's Agents and Agencies
  - Stay current on company products and services
  - Maintain an accurate and updated database of client information
- Onboarding New Clients
  - Take inbound calls/emails from new/existing Agents, run proposals/RFPs, and proactively attempt to convert that potential business to real sales in new and/or existing accounts
  - Manage assigned accounts efficiently, partnering with their Regional Sales Manager to provide solutions to agents, clients and agencies
  - Act as a liaison between the client/agent and Illinois Mutual's Regional Sales Managers and various departments (underwriting; policy service; agent commissions/appointments; IT) involved with the benefit plan
  - Conduct quarterly meetings with agents and accounts to review any needs or cross selling opportunities
  - Help host employee presentations, administration procedures, training, web site training, benefit management, reporting and analysis
  - Troubleshoot, identify, and improve internal processes with various Illinois Mutual's departments to help enhance the agent or case experience



## Qualifications

- Bachelors Degree\* required
- Employee benefits sales experience, including worksite product expertise and historical advising of agents as to when and where products should be added to new or existing accounts
- Strong communication skills
- Strong organizational and time management skills
- Detailed oriented and capable of multi-tasking
- Ability to conduct themselves with professionalism and integrity
- Ability to take initiative and work with little supervision
- Ability to build agent relationships through support efforts
- Good problem-solving skills
- Ability to work and interact with respect in a team environment
- Familiarity with Microsoft Word, Excel and Power Point

\*College or university must be sufficiently accredited and listed in the U.S. Department of Education Accreditation Directory.

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