



Account Manager

MidAmerica

MidAmerica is one of the nation's leading providers and administrators of retirement and other tax-advantaged benefit plans for government and education employers throughout the US. The company provides innovative employee benefit programs for over 1 million educators and other public-sector employees through 2,200 plan sponsors across the country and has assets under management exceeding \$1 billion. Originally formed in 1995, MidAmerica's core business has been providing Social Security Alternative and Special Pay programs (tax-advantaged vacation and sick pay plans for governmental employers). This core business has grown dramatically and has expanded to include other defined contribution plans, Health Reimbursement Arrangements (HRA), Flexible Spending Accounts (FSA), Trusts (for public employer-sponsored healthcare plans that keep healthcare liability off the books), independent Third-Party Administration Services (403(b) and 457(b) compliance and common remitting), and most recently, ACA Compliance Reviews. To date the company sells and distributes its products and services through a distribution network of insurance brokers that primarily sell into the public sector.

Position Overview

Reporting to the Director of Marketing of this growing financial services company, the Account Manager is primarily responsible for client satisfaction, problem resolution, proactive servicing of accounts, and cross selling other MidAmerica solutions to the client. The Account Manager will strategically monitor account activity and stay ahead of issues. The account manager will also provide consultative services to the employer to ensure client is comfortable with potential changes. The ability to work in a fast-paced and deadline driven environment is essential.

The incumbent must have the knowledge and skills to successfully thrive in a growth-oriented team. This position involves providing exceptional service to clients, communicating product knowledge accurately and effectively with distribution partners, client participants and team members. The Account Manager while servicing client accounts will look for cross selling opportunities and enhancement of current services. The Account Manager will produce professional communications pieces including presentations, meeting notes, department organizational charts, and various e-mails to internal and external parties.

Primary Responsibilities

MidAmerica's Account Manager acts as the interface between the client and MidAmerica, and channels information between external and internal parties to provide exceptional customer service and ensure expectations are met. They serve as the face of MidAmerica to client, a single point of contact to handle the client's needs. The Account Manager handles a variety of tasks for both internal & external employees and partners, such as written communications, vendor management and client contact management. The primary duties and responsibilities of the Account Manager include but are not limited to the following:

- Liaise with internal departments to ensure the plan is accurately set up for successful processing and implementation
- Have a clear understanding of plan design, communicate the plan design, both written and verbally to internal stakeholders, and ensure the employer is aligned with proper expectations.
- Establish a clear communication plan with the employer and deliver on expectations
- Accurately determine tier of clients during the plan implementation phase
- Following plan implementation and tier designation, the Account Manager should identify each key stakeholder at employer and articulate a communication roadmap. The roadmap should include the appropriate number of touches based on tier with each contact having a specific strategy and agenda.



- Manage all plan setups and terminations, either directly or through administrative assistant.
- Obtain employer buy in during new case calls and clearly articulate what the employer should expect during the first plan year.
- Account Manager should proactively monitor plans to look for any services issues and intervene before client brings it to our attention.
- Review customer service interactions to determine proactive steps to minimize any confusion or concerns the plan participants may have
- Keep current and provide compliance and legal resources for complex regulatory questions to internal/external staff
- Responsible for updating technology platforms based on plan design changes and/or regulatory changes, either directly or through administrative assistant.
- Continuously evaluate and identify opportunities to drive process improvements that positively impact the business
- Identify gaps in our service offering and communicate them for executive consideration
- Deliver exceptional on-demand client support for clients and partners which results in fanatical support of MidAmerica
- Provide branded documentation, marketing material and any necessary reporting assistance
- Ability to provide extremely professional and articulate written and verbal communication
- Must routinely meet daily, weekly, and monthly deadlines
- Maintain a pleasant, patient, and friendly attitude

Performance Measures

Performance will be measured by a number of quantitative and qualitative criteria. The primary outcomes and measurement of success for the Account Manager include but are not limited to the following:

- After completing initial training & onboarding develop a professional personal brand for communications with internal staff as well as external partners
- Deliver exceptional on-demand client support by providing error-free processing
- Drive new business growth through cross-sell opportunities
- Provide information and assistance to other departments to ensure accurate plan processing
- Be sensitive to the timely response required by clients, both internal and external and respond to all queries within 24 hours
- Ability to use technical tools to drive efficiency and accuracy
- Meet all other activity and outcomes goals including review calls established by the client tier
 - Tier 1 Clients – Account manager should hold a quarterly call with client. Not all stakeholders need to be on all calls, but each quarterly call should include the relevant stakeholders
 - Tier 2 Clients – Account managers should hold 3 calls per year with Tier 2 clients. The same objectives as Tier 1 clients should be accomplished, but through a condensed communication plan
 - Tier 3 Clients – Account managers should hold 2 calls per year with Tier 3 clients
 - Tier 4 Clients – Annual calls should occur with the objective of meeting all Tier 1 objectives in one call



Skills and Qualifications

Specific Qualifications and career profiles that are essential to the position are as follows:

1. Strong analytical, communication, and evaluation skills
2. Experience working in a fast-paced, high volume environment
3. Ability to work independently and collaboratively with team members
4. Proficient in Microsoft Office Suites, specifically Outlook, Word, and Excel and other bespoke programs necessary for data collection and collaboration
5. The ability to convey highly detailed information clearly, succinctly and effectively
6. Regular attendance is required

Specific competencies and attributes that are important to the position include:

1. Retirement industry experience preferred
2. Working knowledge of IRS regulations and ACA guidelines is preferred
3. Must have superior organizational skills, the ability to multi-task, prioritize and work in a team environment

Location

The position is based at the company's corporate headquarters on Harbour Island in Tampa, Florida.

Contact

Interested? Please submit resume to Human Resources at careers@myMidAmerica.com