



## Manager of Client Services

### Position Overview

The Manager of Client Services is primarily responsible for the management of the Account Management team, focusing on client and partner satisfaction, client issue resolution, proactive account service, and cross-selling MidAmerica solutions. This role assists in the development and execution of MidAmerica's client and partner service vision.

The Manager of Client Services will identify and act on natural opportunities to deepen client relationships and enhance service offerings, all while providing leadership and development of a team that serves as an advocate for the customer. The Manager of Client Services will work closely with internal partners to produce communication pieces, facilitate education for employers and partners, implement processes and technologies that improve service, and generally ensure that MidAmerica effectively delivers on our value proposition to both clients and partners.

### The Ideal Candidate

The candidate should possess the following:

- Successful track record for leading, managing, and developing high-performing teams
- Ability to drive results and accountability through a group of direct reports and internal partners
- Experience engaging and empowering others to achieve objectives
- Ability to translate day to day activities of a team into client satisfaction and top line growth
- Excellent judgement and problem resolution skills
- Ability to lead and manage change to transform a department from reactive problem resolution to proactive client service
- Ability to analyze raw data and translate into meaningful insights
- A service mindset – towards our employees, partners, and clients
- Experience leading successful cross-sell initiatives

### Primary Responsibilities

MidAmerica's Manager of Client Services serves as a leader and coach for the Account Management Team, whose objective is to provide exceptional customer service to internal operational teams and external clients/partners, ensuring expectations are met and the needs of the client are solved through MidAmerica's products and services. The primary duties and responsibilities of the Manager of Client Services include but are not limited to the following:

#### Responsibilities:

- Lead and monitor team performance, identify training opportunities, and provide coaching to improve performance
- Engage and inspire Account Management Team to deliver exceptional customer service and drive results
- Handle complex customer inquiries and escalations; ensure they are seen through to resolution
- Serve as an escalation point for key employers and partners to make sure that all expectations are met or exceeded
- Coordinate team scheduling to ensure adequate coverage exists to manage workloads effectively
- Liaise with internal departments to ensure the client's plan is accurately set up for successful processing and implementation
- Gain a clear understanding of plan design, communicate the plan design to internal stakeholders, and ensure the employer is aligned with proper expectations



- Proactively monitor plans to look for any services issues and intervene before they impact client
- Review customer service interactions to determine proactive steps to minimize any confusion or concerns plan participants may have
- Utilize internal client data to spot trends and inform future initiatives
- Serve as the liaison between the Account Management Team and other departments to ensure effective communication flow and information sharing
- Work with internal partners to develop and manage the execution of outbound campaigns
- Update technology platforms based on plan design changes and/or regulatory changes
- 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

## Performance Measures

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

- Deliver exceptional on-demand client support by setting our Account Managers and operational teams up for success – proactively understand and address key client areas of focus and make sure they are having a best-in-class experience
- New business growth through cross-sell opportunities
- Provide information and assistance to other departments to ensure accurate plan processing and collaboration
- Managing timely and accurate responses to clients, partners, and participants
- Use technical tools (CRM, benefit program platforms, partner portals, etc.) to drive improved service delivery and sales enablement
- Drive a highly successful Account Management team to meet any previously established outreach criteria; assist in Marketing campaigns and establish regular touchpoints with key clients and partners

Additionally, the candidate will support the company's vision, mission, and values and help drive a PeopleFirst culture, doing what's best for the business, its employees, and its investors, while protecting the company's reputation and being open, honest, and fair in all dealings and scenarios.

## Skills and Qualifications

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

1. Must have minimum 6 years of successful leadership and coaching experience
2. The ability to engage, develop, and motivate staff to meet or exceed established goals and metrics
3. Strong analytical, communication, and evaluation skills
4. Experience working in a fast-paced, high volume environment
5. Ability to make decisions in a timely manner, both independently as well as collaboratively, that are in the best interest of the client and the company
6. Proficient in Microsoft Office Suite, specifically Outlook, Word, and Excel and other bespoke programs necessary for data collection and collaboration
7. The ability to convey highly detailed information clearly, succinctly, and effectively
8. Bachelor's Degree



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

1. Retirement industry experience preferred
2. Solid understanding of all plan offerings and guidelines
3. Must have superior organizational skills, the ability to multi-task, prioritize and work in a team environment
4. The ability to interact with all levels of staff

## Location

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

## About Our Work Environment

Our culture and environment encourage people who want to make significant contributions, work on challenging assignments, and prefer an open-minded approach to work. As a mid-stage company we seek people who are not afraid to take on varied assignments and to help out wherever needed. Someone looking for a structured corporate environment with weeks of training before starting the job would not be an ideal candidate. We have an exciting, open work environment that encourages team members to share ideas, try new things, and learn from past experiences. We look for team members who can collaborate with others, will challenge the status quo, understand the bigger picture, and make good decisions. We strive to help our employees achieve personal goals while contributing to the overall team effort. Reasonable accommodations will be made for applicants with qualified disabilities. All applicants must successfully pass a criminal background check and pass a drug test prior to commencing employment.

## Compensation

Compensation is fair and competitive, and the company offers an attractive benefits package.

## Contact

Interested? Contact MidAmerica by emailing [Careers@myMidAmerica.com](mailto:Careers@myMidAmerica.com) to apply.