

Greater Cleveland Partnership Position Description

POSITION TITLE:	Member Service Professional (Insurance Level 1)
DIVISION/DEPARTMENT:	COSE Member Services
REPORTS TO:	Member Service Manager
FLSA CLASSIFICATION:	Non-Exempt

POSITION SUMMARY:

Provide the highest level of customer service for enrollment and premium billing questions of new, small groups (1-9 members) and retention of existing small groups for medical, dental, vision, and life insurance products. Employ excellent problem solving skills to provide resolutions quickly to inquiries received via phone, email, and written correspondence. Scanning of routine applications and updates for new and existing client groups with a high level of accuracy.

ESSENTIAL FUNCTIONS:

- Maintain a complete knowledge of all insurance products including medical, dental, vision, and life insurance
- Maintain a through knowledge of all savings programs included with group membership such as: office products, energy programs, & payroll discounts.
- Answer incoming calls from the customer service queue regarding enrollments or billing
- Cross sell and educate members on all products available to members.
- Manage relationship with specific book of business of current members. Engage member and complete touch points per requirements of COSE member engagement program providing a deeper connection to COSE for the member and working to identify and deliver the best combination of resources for the member's needs to increase the value they receive from the organization, support retention of the member and generate referrals for additional member prospects.
- Actively participates in department initiatives, incentives and programs implemented to enhance member engagement and contribute to increasing revenues of the organization.
- Submit enrollment processing requests and updates for new and existing groups and employees in benefits plans and perform complete audit to ensure accuracy
- Complete document scanning for new and existing small groups
- Work with other internal and external customers and vendors including insurance carriers, brokers, group officials, and subscribers to provide resolutions to benefit inquiries, renewals, ratings, enrollment, eligibility, delinquency, and cancellations for all small groups.
- Promote a positive and professional organizational image to the public and maintains continuous contact with each customer until the inquiry is resolved appropriately
- Research and take appropriate action to achieve closure on written inquiries including grievances and legal issues.
- Perform administrative duties as assigned:
- Other job-related duties as assigned.

COSE ESSENTIAL FUNCTIONS:

- Ensure focus on COSE core values (Sincere, Helpful, Accessible, Resourceful, Responsive) as part of COSE “Member First” Approach.
- Attend COSE University trainings and complete COSE University coursework in a timely manner to ensure and maintain current knowledge of COSE services, products, programs, engagement skills and expectations.
- Document and track all member engagements in the CRM.
- Attend both COSE and external events as required to engage with prospects and members.

PREFERRED EDUCATION, EXPERIENCE AND SKILLS:

- High School Diploma Required. Bachelors Degree or equivalent experience preferred
- Two to three years customer service experience with insurance products and programs, preferably in a call center queue environment
- Experience with fully insured products preferred
- Ability to cross-sell other products and services
- Strong customer focus and sense of urgency to resolve issues quickly and accurately
- Excellent, oral, written and interpersonal skills
- Demonstrated organizational skills
- Ability to perform independently, in a fast-paced, team environment with multiple priorities and competing deadlines
- Superior analytical, problem solving and decision making skills
- Ability to build effective relationships with employees at all levels within the organization
- Experience working with small business owners
- Experience with a membership organization
- Highly energetic, enthusiastic, friendly, poised, optimistic and outgoing.
- Flexible to work overtime as requested and to work outside of the normal scheduled workday
- Proficient in Microsoft Office Programs including: Word, Excel, and Outlook

PHYSICAL REQUIREMENTS:

- May be required to work more than 8 hours during a workday
- Sitting for long periods of time
- Limited travel/driving required
- Significant manual dexterity for keying in data for long periods of time

SCHEDULING REQUIREMENTS:

- Must be available to work occasional off-hours
- Must be available during standard business hours
- Incumbent has the limited flexibility to schedule activity with the approval of supervisor
- This position may not be performed from a remote location except in limited special circumstances.