

## **ACCOUNT MANAGER – TIER 1 (ASSOCIATE AM) JOB DESCRIPTION**

**Job Title:** Account Manager – Tier 1  
**Department:** Client Relations  
**Reports To:** Manager of Account Management  
**FLSA Status:** Exempt

### **SUMMARY**

This position is an entry level position and reports to the Manager/Director of Account Management of CHC Wellbeing, Inc. (“CHC”). For over 18 years, CHC Wellbeing has worked with companies across the country to create a workplace community that makes employee wellbeing a top priority. We provide a high-touch, onsite and telephonic experience that provides clinically-based interventions that improve member health. Combined with our suite of digital and mobile tools, we go beyond just physical health and provide personalized digital health journeys where the member is in the driver’s seat. Companies that partner with us achieve lower healthcare costs, increased productivity and employees that bring their best selves to work.

The core responsibilities of a Tier 1- Account Manager is to focus on client implementation specific to small client events where health evaluations are the primary offering. Responsibilities include flawless execution of event scheduling and logistics. Tier 1 – Account Manager is responsible for having a comprehensive knowledge of our CHC Wellbeing products and offerings to assist clients with the execution of their health evaluation events. Where applicable the Tier 1 – Account Manager will work in collaboration with a Senior Account Manager to ensure the Health Evaluation components of a client’s program are completed. Tier 1 – Account Manager demonstrates a solid understanding around success of the program and identifying potential risk.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

Important responsibilities include, but are not limited to:

#### *Event Scheduling*

- Manages client outreach and event scheduling for a core group of clients as identified by the organization – typically relationships ranging in size from 50 - 250 eligible participants.
- Supports the assigned Senior Account Manager with implement of onsite event scheduling when applicable
- Overall knowledge of client, client expectations and goals to effectively present information, respond and follow up on questions and inquiries from clients
- Manages correspondence with clients an acknowledged receipt within 24 hours

- Manages new requests to ensure high-quality execution
- Trouble shoots and resolves client issues

### *Implementation and Service Delivery*

- Outreach to clients offering health evaluations to schedule events
- Work with the client to understand facility logistics, shift times, type of work environment, etc., and design a location specific plan to maximize participant engagement
- Discuss eligibility specifications and initiates file transfers where applicable
- Ensures the accuracy of all client information
- Provide health evaluation event communications
- Monitor event registration and modify arrangements considering the location's needs, assessing phlebotomy team resources, appointment availability, etc.
- Work with internal teams to provide data and reports as it relates to incentive delivery and program completion.

### **REQUIRED KNOWLEDGE SKILLS AND ABILITIES:**

- Proven ability to manage multiple projects at one time while paying strict attention to detail
- Ability to work in a team based, collaborative environment
- Knowledge of HIPAA
- Excellent organizational skills
- Excellent verbal and written communication skills

### **EDUCATION AND EXPERIENCE:**

- Experience in account management or other relevant experience
- Experience in the wellness field/industry is preferred
- Minimum of a BA/BS degree or equivalent work experience

**LANGUAGE SKILLS:** N/A

**MATHEMATICAL SKILLS:** Basic skills.

**COMPUTER SKILLS:** Excellent computer skills with proficiency in work and Excel.

**REASONING ABILITY:** Must possess sound judgment, and business acumen skills.

**CERTIFICATES, LICENSES, REGISTRATIONS:** N/A

**PHYSICAL DEMANDS:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**WORK ENVIRONMENT:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This position requires the individual to be in the office located in Chicago, Illinois a minimum of three days per week and available to support onsite client meetings. Minimal travel may be required.

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- I acknowledge that I am able and capable of successfully performing all functions of the job requirements specified above.
- I acknowledge that I am not currently able to perform all of the job requirements listed above but am willing to be trained to meet the job requirements within 3 months of signing this document.

Areas I need additional training to be able to perform job requirements above (please list):

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date: \_\_\_\_\_