MOREBO

JOB PROFILE
SENIOR EMPLOYEE BENEFITS CONSULTANT

Reports to Executive Director – Employee Benefits
Division Employee Benefits

PURPOSE OF THE JOB

1. Manage the day-to-day client relationship, consulting, administration and support functions as per allocated portfolio.
2. Assist in the development of and be responsible for the execution of the MOREBO employee benefits client and member experience.
3. Ensure client retention and identify cross sell opportunities on behalf of the employee benefits business unit.

ROLES AND RESPONSIBILITIES

- Provide technical support to the Employee Benefits administrative team, Managers and Directors as and when requested
- Keep written record of all communication and interactions with clients i.e. meetings, telephone conversations, etc.
- Attend regular meetings with (1) operations team to discuss workflow and problem areas and (2) Administrators/service providers regarding status of funds
- Liaise internally and externally regarding the setting up of meetings
- Ensure data/contributions/premiums are received timeously by administrator/insurer
- Negotiate with insurers/service providers to obtain competitive rates on: Group Life Schemes, Permanent Health Insurance Schemes, Funeral Schemes, Investment Consulting Services, Fidelity Guarantee Insurance, any other products
- Drive company and divisional sales strategy
- Compile fee notes for finance to send to clients/funds, where necessary
- Assist and reply timeously to clients with written and verbal interaction
- Set out an annual consulting calendar per client and ensure items are attended to timeously.
- Adhere to all aspects of the Consultant's Best Practice guide
- Prepare agendas and meeting packs for Employer Management Committee meetings and other ad-hoc meetings as required, attend, take accurate minutes and ensure distribution to all participants
- Monitor action items from Employer Management Committee meeting minutes and all other documentation to ensure deadline compliance
- Follow up on medical requirements for member and underwriting decisions
- Request asset information from asset consultants/managers for insertion in Employer Management Committee packs
- Compile, collate, copy and bind Employer Management Committee meeting packs and distribute to clients prior to meeting
- Work together with management on ad hoc projects to further business development i.e. presentations, functions etc.
- Take ownership for driving own career development
- Perform any other duties as may reasonably be required by management.

SKILLS AND COMPETENCIES

- Excellent verbal and written communication skills
- Strong interpersonal and social skills
- Strong navigation towards client-service excellence
- Excellent telephone and email etiquette
- Analytical and problem-solving skills
- High level of accuracy with strong attention to detail
- Strong ability to organise and prioritise tasks
- Results-orientated
- Time management and ability to perform well under pressure
- Ability to work individually and within a team environment
- Proactive attitude
- Computer literate: MS Office packages (Word, Excel, PowerPoint, Outlook), CRM Experience

QUALIFICATIONS AND EXPERIENCE

- Grade 12
- Bachelor of Business Science/ Bachelor of Commerce degree or equivalent NQF 6 tertiary qualification
- 5 years'+ experience in a similar role within the Financial Services industry
- Product and processing knowledge
- Systems knowledge