



## **Strategic Benefits of Cincinnati**

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# **BENEFIT ADVOCATE**

## **Company Overview**

Strategic Benefits of Cincinnati is a full-service group benefits broker. As a local agency, we represent all major carriers to provide comprehensive employee benefit programs to our clients. We have over 700 group clients in the Greater Cincinnati area, ranging in size from 2 to nearly 1,000 employees. We partner proactively with our clients to assist them in meeting their benefit, health and wellness goals.

## **Position Summary**

A Benefit Advocate (BA) works in conjunction with a Benefit Consultant (BC) to deliver proactive service to their mutual group of clients (a book of business). The BA interacts with clients and their employees to resolve enrollment and termination issues, acts as liaison with insurance carriers, and develops employee communications. The BA assists the BC in working the renewal process. The BA practices discretionary decision-making daily. BAs must contribute to and flourish in a team environment and engage in regular professional development.

## **Essential Duties and Responsibilities**

- Functions as the main point of contact for the employees of the groups, answering questions, resolving their issues, recording in database.
- Utilizes an efficient process for the timely processing of enrollments, terminations, recording all transactions in a database.
- Acts as a liaison with insurance carriers to resolve claims issues and assist with the appeals process.
- Develops group and employee communication tools, under the instruction of the BC, including but not limited to Benefit Brochures, Enrollment Packets, Compliance Packets, Presentations, Employee Navigator.
- Attends client meetings and presentations with the BC as needed to enhance the relationship and support the BC.
- Manages onsite employee FormFire enrollment processes.
- Utilizes systematic, reproducible processes such as checklists and branded template documents to advance and support the Strategic service model.
- Communicates thoroughly and clearly with all team members concerning client issues, renewals, and projects.
- Utilizes internal database to thoroughly record and document client issues/discussions.
- Actively participates in internal meetings, contributing appropriately in a collaborative manner.
- Exhibits behavior with internal team, external vendor partners and clients that intentionally advances the Strategic culture.
- Other duties and special projects as assigned.

## **Core Competencies and Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty as described satisfactorily and promptly. The requirements listed below are representative of the knowledge, skill, and/or ability required.

- Excellent problem-solving skills with persistence to achieve desired result.
- Service-oriented: kind, compassionate, and willing to work hard on another person's behalf.
- Clear and accurate communication skills, especially verbally.
- Excellent phone skills, being responsive, empathetic, and honest with the information to be shared.
- Able to manage multiple projects simultaneously and successfully.
- Strong organizational skills, including daily prioritization and logical thinking.
- A natural inclination to reach out, build relationships, and proactively uncover issues.
- Strong working knowledge of computer software including Microsoft Office especially Word, Excel and PowerPoint, online platforms and database management.
- Ability to build professional relationships with multiple levels of corporate environments.

## **Education and Experience**

- Associate degree or commensurate business experience
- Minimum 1-3 years of experience in benefits focusing on customer service, benefits administration, claims or human resources

## **Licenses and Certifications**

- Ohio or Kentucky Life and Health license, or ability to obtain upon hiring



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