QUALITY CARE PARTNERS
JOB DESCRIPTION

JOB TITLE: Sr. Client Success Manager

POSITION SUMMARY:
We are seeking a dynamic and experienced **Sr Client Success Manager** to lead business development initiatives, vendor implementations, strengthen client partnerships, and support the company's growth strategy. This position will oversee sales planning, client service operations, and marketing activities that enhance visibility and profitability.

The ideal candidate has a strong background in health insurance, data creation and analysis, benefits consulting, coupled with exceptional relationship management, leadership, and communication skills.

KEY RESPONSIBILITIES:
Sales Strategy & Execution

- Develop, implement, and manage annual sales plans designed to achieve company growth objectives.
- Identify new business opportunities, target markets, and potential partnerships to expand client base.
- Deliver presentations, proposals, and marketing initiatives that effectively communicate value and drive engagement.
- Track key performance metrics, forecast sales trends, and report progress to senior leadership.
- Manage relationships necessary with Employers, TPA's and Brokers to foster ongoing growth and retention while maintaining positive energy between parties.

Client Relationship Management

- Build and maintain long-term relationships with Third-party Administrators, business partners, consultants and individual clients.
- Serve as point of contact for client accounts, ensuring superior service and satisfaction.
- Oversee resolution of service issues to maintain positive client relationships.
- Develop, oversee and manage the necessary reporting for clients on cadence acceptable to client and broker

Team Leadership & Collaboration

- Supervise and mentor sales and client service staff, fostering professional growth and performance excellence.
- Collaborate across departments — including marketing, operations, and compliance — to ensure cohesive client support.
- Promote a culture of accountability, innovation, and continuous improvement.
- Identify areas of improvement for product delivery, development and market relevance

Operational Oversight & Compliance

- Manage CRM systems, implementations, and carrier/vendor relationships to support sales efficiency.
- Stay current with federal and state insurance regulations, ensuring all activities meet compliance standards.
- Provide insights on market conditions, competitor activity, and emerging industry trends to inform business strategy.

QUALIFICATIONS:

Required:

- Bachelor's degree in Business, Marketing, Finance, or related field.
- Minimum of 5 years of experience in sales, marketing, or client relations — preferably within the health insurance industry.
- Proven ability to lead a team and achieve sales goals through strategic planning and client engagement.
- Strong communication, negotiation, and presentation skills.
- Proficiency in Microsoft Office Suite and CRM platforms.
- Current Ohio Life, Health & Annuities License.
- Maintain current unrestricted Ohio Drivers License

Preferred:

- Experience managing benefit programs, Medicare plans, or ACA-compliant insurance offerings.
- Proven experience in compliance related to HRA's, HSA's, self funded, level funded, fully insured, ICHRA and marketplace product structures, risk levels and data management needs

Core Competencies

- Strategic Sales Planning
- Client Relationship Management
- Negotiation & Contract Management
- Market Research & Competitive Analysis
- Team Leadership & Mentorship
- Compliance & Regulatory Knowledge
- Problem Solving & Decision Making

DEMONSTRATE QCP VALUES:

The values of Quality Care Partners are demonstrated daily and reflected through job duties and responsibilities as evidenced by:

- **Caring:** Seek to listen, understand and respond to our customers' needs with care; Communicate with co-workers and customers with positivity and empathy; Be good stewards of QCP resources.
- **Excellence:** Strive to exceed, not just meet expectations; Always deliver services with accuracy and efficiency; Recognize and utilize your strengths and the strengths of others.
- **Improvement:** Bring new ideas to create positive change and solutions; Be open to the ideas and suggestions of others; Be an advocate to continuously improve QCP.
- **Accountability:** Take ownership for your daily decisions; Stay focused on your job and eliminate distractions while at work; Demonstrate QCP values in everything you do.

TRAITS AND APTITUDES:

- High level of awareness of pertinent details; excellent organizational skills.
- Excellent verbal and written communication skills.
- Must handle pressure effectively.
- Professional appearance and demeanor.
- Able to maintain confidentiality.
- Excellent computer literacy and skills with the ability to master programs needed for position.

PHYSICAL DEMANDS AND WORK CONDITIONS:

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.

- Must have excellent written and verbal communication skills as well as the ability to observe, assess, guide and evaluate others.
- Must be able to hear, speak, and see and to coordinate motor skills.
- Must be able to sit for prolonged periods of time.
- Must be able to climb, lift 25 pounds, stoop and bend and reach above head.
- Ability to collect data, interpret findings, set priorities and carry out established plan.
- Ability to read, write and utilize manual and computerized systems of documentation.
- Must read a significant amount of information in a relatively short period of time.

EEO STATEMENT:

Quality Care Partners is an equal opportunity employer that is committed to inclusion and diversity. We take affirmative action to ensure equal opportunity for all applicants without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, Veteran status, or other legally protected characteristics.

REPORTING RELATIONSHIPS:

Position Reports to: Chief Operating Officer