

Lawley

INSURANCE | EMPLOYEE BENEFITS

Employee Benefits Data Quality Analyst

Position Focus:

- Maintain and review the workflow and data quality within Salesforce and contribute to workflow enhancements, and documentation of new workflows and processes
- In accordance with established procedures, provide training for both new and current employees to insure consistency
- Maintain effective working relationships with carriers and agency personnel
- Act as the gatekeeper for all new and renewal business within Salesforce, approving all opportunities after reviewing data fields and attachments related to the account
- Identify and recommend training opportunities for producers, partners and service staff as it relates to Salesforce
- Refine and streamline commission auditing process, utilizing Salesforce reporting & tracking capabilities; continues to work with carriers to resolve outstanding issues on an as-needed basis
- Support 5500 process and filing as requested
- Maintain and track all commission and producer changes as guided
- Fulfill ad-hoc reporting and data requests to the Leadership Team upon request
- Communicate with carriers or vendors on discrepancies or errors in commission payments
- Support all Lawley initiatives as requested, guided by company values, sales culture, business needs and scorecard

Successful candidates possess:

- Bachelor's degree
- MS Office proficient; intermediate or advanced Excel skills required
- Knowledge of customer relationship management platforms; preferably Salesforce
- Ability to train and deliver technical training solutions
- Ability to work well independently and on a team
- Incredible attention to detail and organizational skills
- Positive attitude, even in a fast paced environment
- A passion to make customers and coworkers feel important and valued
- Capability to work quickly and efficiently
- Methodical, yet swift decision making skills
- Precise verbal and written communication skills, even under time constraints



Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics.