

Lawley

INSURANCE | EMPLOYEE BENEFITS

Employee Benefits Operations Analyst

Position Focus:

- 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
- Run monthly/quarterly audit reports and review for accuracy, make changes where necessary and reach out for training opportunities where applicable
- Advise on Ad-hoc quality issues within Salesforce, document new/updated processes where applicable
- Recommend workflow enhancements, identify training opportunities within Salesforce as applicable
- Support 5500 process and filing as requested
- Maintain carrier contact and carrier commission information
- Maintain and track all commission and producer changes as guided
- Ad-hoc reporting and financial analysis upon request
- Communicate with carriers or vendors on discrepancies or errors in commission payments
- Support all aspects of agency operations, including M&A, changes to operational models, etc.
- 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 and desire to obtain LAH license with the first year of employment (Lawley supported)
- 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
- Ability to maintain the highest level of confidentiality
- 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.