Account Analyst – Service Excellence Team

PURPOSE

Account Analyst is responsible for assisting the Account Specialist with resolving complex issues that arise in various functions within PERF. Work involves a broad understanding of plan provisions and laws governing the Fund, including among other things, the computation of retirement, disability and survivor benefits, the self-directed investment options of the Annuity Savings Account, Quarterly Member Statements of Account, and various other accounting functions. This position reports directly to the Director of Customer Services.

DUTIES AND RESPONSIBILITIES

This position requires a broad knowledge of pension benefits as well as a general knowledge of every aspect of the Fund's operations, ability to coordinate with other functionaries within the organization both verbally and in writing to resolve member, employer and employee issues. The position will require strong interpersonal skills to create positive work relationships. The primary duties of this position include, but are not limited to the following:

- Providing clerical and general work support to Account Specialist, which includes conducting research, analyzing data, writing letters, contacting members and employers via telephone and e-mail
- In addition to supporting the Account Specialist, the Account Analyst will also be required to provide back-up phone support to the PERF Call Center, as well as various other customer service duties. A high level of flexibility will be required.
- Provide an interface between PERF employees and the Account Specialist to ensure that timelines are met, and disruptions are kept to a minimum
- Track all contacts and requests submitted to the Service Excellence Team. Since this is a new team, a tracking mechanism as well as methodology will need to be developed and implemented
- Development of various reports for Senior Management to include work volumes, number and types of inquiries, as well as response timelines
- As directed by the Account Specialist, make various adjustments to members' accounts, and properly documenting each account to ensure that should the issue arise again, it can be responded to quickly and efficiently
- Assist with the development of User Desktop Procedures as well as employee training programs designed to improve Customer Service
- Provide clerical support in order to process Minimum Required Distribution project in a timely manner
- Participating on Quality Improvement Teams to identify business processes that undermine adequate customer service and making recommendations for their resolution
- Making outbound calls resulting from the resolution of a research issue and/or follow-up to a previous call made by a member or employer
- Assist with providing training to new PERF employees as needed
- Related duties and projects as assigned.

JOB REQUIREMENTS AND DIFFICULTY OF WORK

Requirements and difficulty of work include:

- Maintaining a professional demeanor in all situations
- Demonstrating patience while determining caller's needs
- Using techniques to effectively manage challenging customers

- Taking ownership of a member's or employer's issue and seeing to it that the situation is resolved as promptly and effectively as possible
- Researching and following-up on complex issues. Documenting various road-blocks and offering solutions to complex customer service problems
- Engaging the appropriate person/department to solve a problem for a member or employer.

QUALIFICATIONS:

The primary responsibilities of this position include, but are not limited to the following:

- A strong understanding and ability to explain to employees, members and employers the various rules, regulations and procedures. A broad understanding of the Fund and the ability to research and document scenarios to aide in training of PERF staff
- With direction from the Account Specialist, process disability recalculations, interest calculations, assist with educating employers on PERF's processes and procedures, development and ongoing support of Outreach materials, compliance enforcement, separation of duties, etc.
- Maintenance and ongoing support of PERF new-hire training program
- Providing clerical support for the processing of the Minimum Required Distribution file and ensuring PERF's compliance with IRS rules and regulations including proper documentation on each account
- Providing clerical support to Account Specialist to ensure that Cost of Living Adjustments, 13th checks and $180 minimum benefits are processed correctly and are in compliance with State statute
- Excellent problem solving, research and analytical skills necessary for interpreting and responding to technical inquiries from various sources
- Exceptional oral and written skills needed for communications over the phone and in writing with members, employers and PERF staff. Ability to assist with the development of various training documents which will enhance service to members, employers and employees
- A strong understanding of PERF information system (SIRIS), e-mail software and other personal computer skills.
- Strong organizational skills needed in setting priorities and effectively meeting deadlines.

MINIMUM EXPERIENCE

Undergraduate degree and experience in financial services, insurance, group benefit or pension industry preferred. Job experience can substitute for undergraduate degree. Candidates must have: at least 2 years of PERF work experience; superior communications skills – both written and verbal; strong computer skills in Microsoft Office, Windows and e-mail; and a positive attitude, passion for providing world class customer service, and an emphasis on problem solving. Prior Accounting experience is helpful, but not required.