

Jacqueline Anne Mora

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Proven ability to retain and grow book of business. Develop excellent client relationships that lead to account retention and cross-sales opportunities. Successful in maintaining exceptional client satisfaction in both account management and client advocacy.

Professional Experience:

Corporate Synergies Group, LLC, New York, N.Y.

01/2018-01/2019

Senior Account Specialist

Provided in-depth support to the Account Management team resulting in a direct impact on client retention and growth.

- Assisted the Regional Vice President, Director and Account Managers in preparing for client renewals of existing products.
- Updated client database with account and plan details of renewal to ensure accuracy of Corporate Synergies' revenue.
- Worked directly with clients to ensure accuracy of information necessary for the renewal process and the implementation of new products.
- Gathered and prepared data for presentation at client meetings.
- Requested Schedule A forms from insurance carriers to assist with preparation of clients' 5500 reporting.
- Created employee benefit guides and Open Enrollment communication materials.

CareConnect, East Hills, N.Y.

06/2016-04/2017

Large Group Account Manager

Established and maintained relationships with clients, brokers, general agents and internal business partners to ensure client satisfaction, resulting in growth and account retention.

- Managed 14 Large Group accounts representing 2,500 plus members in New York.
- Met with both new and established clients, their brokers of record and general agents to build relationships and address client concerns and issues.
- Proactively partnered with internal departments to ensure quick resolution of enrollment, billing and claim issues.
- Reviewed and verified accuracy of billing reconciliations prepared for clients.
- Presented products, services and plan design information at group Open Enrollment meetings in English and in Spanish.
- Trained clients on the use of CareConnect's enrollment portal.

SterlingRisk, Woodbury, N.Y.

06/2011-06/2016

Client Concierge, Employee Benefits Department

Provided Client Concierge services to 20 plus SterlingRisk V.I.P. clients. Acted as an advocate for employees of V.I.P. clients to help navigate through complex medical, dental and vision claim issues.

- Guided clients through the appeal process, including the writing and submission of appeals internally to insurance carriers' appeals departments and externally to NYS Department of Financial Services.
- Acted as a liaison between the clients' employees, doctors' offices and insurance carriers to ensure adequate and timely claim resolution.
- Negotiated with doctors' offices to reduce exorbitant client bills as a result of Usual, Customary, and Reasonable (UCR) balance billing and denied claims.
- Resolved emergency care situations requiring prior authorizations.
- Resolved complex pharmacy and Durable Medical Equipment (DME) claims.
- Conducted Open Enrollment meetings in Spanish for clients' Spanish speaking employees.

Empire Blue Cross Blue Shield, New York, N.Y.

05/1998-11/2009

Account Manager, Commercial Sales (2005-2009)

Drove account growth expansion in the mid-size market. Supervised and retained 70 accounts representing 8,000 plus members in the Manhattan territory. Manhattan clients accounted for approximately \$36 million in annual sales premium in 2009.

- Consistently met and exceeded the territory annual membership retention goal, averaging 102% to 104% goal attainment from 2007 to 2009.
- Successfully provided clients with alternative plan options that resulted in high group renewal retention of approximately 95% for 2008 and 2009.
- Highly successful in negotiating sound renewals with brokers and underwriters in order to retain client accounts and broker relationships.
- Identified opportunities for adding ancillary products and increased cross-sales gains.
- Delivered high impact presentations at group educations and open enrollment meetings resulting in well informed plan members and an increase in overall growth in territory.
- Researched client and broker issues and expedited resolutions.

Community Market Account Manager, Commercial Sales (1999-2005)

Managed, retained and expanded 500 plus accounts in the 2 to 50 employer market in the Manhattan and Bronx territories.

- Winner of 1999-2000 President's Club Award based on sales goal retention exceeding 105% of goal.
- Consistently met and exceeded 100% of sales retention goal.
- Maintained excellent relationships with brokers and client key decision makers.
- Consulted and advised brokers on new health plan offerings and benefit level alternatives resulting in consistent high group retention.

Direct Sales Representative, Commercial Sales (1998-1999)

Sold "Managed Care" and "Traditional Indemnity" plans to Community and Mid-Size Market accounts. Prospects included employer groups ranging from 2 to 500 hundred lives.

Professional Development:

Licensed Life, Accident and Health Agent.
Dale Carnegie-Public Speaking course.
Continuing Education courses for license maintenance.

Honors & Awards:**SterlingRisk:**

Five time Value Card recipient of SterlingRisk Values Program awarded in the years of 2016, 2015 and 2014. Program recognized outstanding performance in maintaining SterlingRisk's cultural values of Integrity, Innovation Collaboration, Care & Respect and Excellence.

Empire Blue Cross Blue Shield:

Winner of President's Club Award, 2000
Appreciation Award, Product Conversion Project, 1999

Language:

Bilingual, delivered Open Enrollment presentations in Spanish.
Translated documents from English to Spanish.

Technical:

Excel, PowerPoint, Word, Publisher

Education:

Bachelor of Arts in Communications Arts / Media, Queens College, Flushing, N.Y.