



Operations Manager: Document Management

Position Overview

Reporting to the VP, Operations of this growing financial services company, the Document Management Manager is primarily responsible for customer satisfaction by providing day-to-day leadership oversight and guidance to the Document Management team by ensuring the staff provides efficient, high-quality customer service to clients on a consistent basis. The ability to work in a fast-paced and deadline driven environment is essential.

This Manager of Document Management provides leadership and coaching for all Document Management employees ensuring world-class service in successfully addressing client needs regarding retirement and health and welfare plans and benefits. The successful candidate will engage and inspire as a culture leader for the Document Management Team.

The Ideal Candidate

The ideal candidate should possess the following:

- Experience building teams with proven leadership abilities to effectively manage customer expectations as well as the employee and team experience
- Strong sense of collaboration and teamwork
- Ability to be agile and resilient under pressure
- Ability to anticipate, understand, and respond to the needs of internal and external clients to meet or exceed their expectations.
- Excellent judgement and problem resolution skills
- Excellent verbal and written communication skills
- Ability to be highly organized and able to prioritize tasks
- A service mindset

Primary Responsibilities

MidAmerica's Manager of Document Management serves as a leader, coach and motivator for the Document Management Team. The team provides key support capabilities to the organization including mail processing, scanning, indexing, in/outbound mail processing, address verification, etc. to ensure and accurate and timely service experience. The primary duties and responsibilities of the Manager of Document Management include but are not limited to the following:

Team Management

- Model and drive exceptional customer service delivery
- Review, implement, and enforce MidAmerica policies and procedures
- Write and conduct annual performance, one-page plan, and performance reviews, salary and bonus reviews
- Proactively communicate team key objectives and deliverables, scheduling, tracking, and reporting
- Proactively monitor team performance, identify training opportunities, and provide coaching to improve performance
- Provide professional and articulate written and verbal feedback.
- Assign, delegate, coordinate, and monitor the work of team members assigned to projects
- Develop and motivate team members to achieve individual, department, and company goals
- Hire, train, coach, and evaluate performance of direct reports
- Oversee creation and maintenance of all team written procedures



- Coordinate team scheduling and payroll approval

Service Excellence

- Possess solid understanding of MidAmerica product offerings
- Through strong listening skills, answer client and employee questions in a timely, accurate manner
- Handle complex customer inquiries and escalations and ensure they are seen through to resolution
- Deliver exceptional on-demand support for clients and partners which results in fanatical support of MidAmerica
- Engage and inspire team to deliver exceptional client service and drive results
- Maintain a professional, pleasant, patient, and friendly attitude during all internal and external interactions

Technical Capabilities

- Ensure daily/periodic processing tasks are completed accurately and timely, including mail pickup/delivery, scanning, indexing, statement and welcome kit production, beneficiary form processing
- Manage and ensure sufficient uptime of technical equipment including printers, scanners, postage machine, etc. and related software (address verification)
- Coordinate and facilitate vendor relationships with team-specific technology (eg: postage machine)
- Manage print production resources and ordering (paper/ink/etc.) to ensure sufficient supply remains on hand for business needs
- Facilitate large mail merge files and print production runs for statements, client mailers, welcome kits, etc.
- Review fax lines as needed and partner cross-functionally to ensure sufficient uptime
- Keep current on relevant compliance and regulatory factors that may impact team (Beneficiary forms, etc.)
- Partner cross-functionally to manage through seasonal or large project production runs such as Required Minimum Distribution(RMD), 1099 mailing, or large welcome kit orders for a new client implementation
- Manage productivity to remain within Service Level Agreement (SLA)
- In concert with leadership and the Finance team, manage team budget effectively
- Using data and metrics, continuously evaluate and identify opportunities to drive process improvements that positively impact the business
- Conduct quality control exercises including call quality review with associates, leadership, etc. to drive team performance and participant satisfaction
- Lead efforts as needed in partnership with IT department, to manage technical issues affecting team productivity
- Routinely meet daily, weekly, and monthly deadlines

Support Platform/Growth Strategy

- Support large conversion projects and facilitate plan transitions such as deconversions, platform migrations, etc.
- Conduct special projects as needed
- Partner with Sales and Marketing to support growth initiatives

Leadership & Strategy

- Liaise between leadership and other functional areas to ensure effective communication flow and information sharing
- Provide leadership and strategic direction to ensure team growth and development
- Share knowledge of processes, procedures, and solicit recommendations for continuous improvement supporting the initiatives of IT and Operations
- Using organizational discretion, apply critical thinking and problem-solving skills to client-related issues.
- Analyze broad organizational aspects and effectively communicate to influence decisions across departments for services, processes, and strategic decisions



- Accomplish organizational goals by accepting ownership and embracing new and different requests; exploring opportunities to add value to position accomplishments

Performance Measures

Performance will be measured by several quantitative and qualitative criteria. The primary outcomes and measurement of success for this position include but are not limited to the following:

- Deliver a professional personal brand for communications with internal staff as well as external partners
- The ability to lead, develop and motivate staff to meet or exceed established goals and metrics and have a thorough understanding of all team responsibilities
- Proactively address employee and client issues to successful resolution
- Provide information and assistance to other departments to ensure accurate plan processing
- Use technical tools to drive efficiency, accuracy, responsiveness, and client satisfaction
- Provide world class onboarding and open enrollment experience as measured by client satisfaction surveys

Additionally, the candidate will support the company's vision, mission, and values and help drive a PeopleFirst culture, doing what's best for the business, its employees, and its investors, while protecting the company's reputation and being open, honest, and fair in all dealings and scenarios.

Skills and Qualifications

Specific Qualifications and career profiles that are essential to the position are as follows:

1. 5+ years of management/leadership experience
2. Retirement industry experience preferred
3. Bachelor's Degree preferred
4. Ability to demonstrate SME level knowledge and to stay abreast of all changes to MidAmerica policies, service offerings, procedures, technology, etc.
5. Ability to interpret legal documents and set/measure KPI's; solid understanding of plan offerings and guidelines
6. Deliver exceptional support for clients and partners which results in fanatical support of MidAmerica.
7. Maintain a professional and pleasant demeanor and demonstrate behavior that strengthens team health & performance.
8. Thorough understanding of print production technology and software
9. Strong product knowledge with the ability to read and interpret plan documents, IRS regulations, and DOL guidelines in order to answer or escalate questions.
10. Ability to manage team performance, facilitate project management, and provide thought leadership to the team.
11. Proficient in Microsoft Office Suites, specifically Outlook, Word, and Excel and other bespoke programs necessary for data collection and collaboration. (advanced Microsoft Excel skills preferred.)
12. Regular attendance is required, and Travel may be required for client meetings (not to exceed 20%).
13. Ability to work both independently as well as collaboratively to make decisions in a timely manner.
14. Communicate product knowledge accurately/effectively with distribution partners, clients, participants & team members.

Specific competencies and attributes that are important to the position include:

1. Exceptional verbal and written communication skills.
2. Must routinely meet daily, weekly, and monthly deadlines.
3. Demonstrated ability to coach, mentor and motivate employees to exceed established goals and metrics
4. Ability to interpret legal documents and set/measure KPI's.
5. Superior organizational skills, the ability to multi-task, prioritize and work in a team environment.



6. Excellent problem solving, leadership, and customer service skills.
7. Strong ability to identify and understand trends; use applicable data to take proactive action.
8. Ability to interact effectively with employees at all levels.
9. Ability to structure and solve complex problems using a fact driven analytical approach.
10. Competent in reading, analyzing and interpreting statistical data and report on data as needed.

Location

The position is based at the company's operations office in downtown Lakeland, Florida.

About Our Work Environment

Our culture and environment encourage people who want to make significant contributions, work on challenging assignments, and prefer an open-minded approach to work. As a mid-stage company we seek people who are not afraid to take on varied assignments and to help out wherever needed. Someone looking for a structured corporate environment with weeks of training before starting the job would not be an ideal candidate. We have an exciting, open work environment that encourages team members to share ideas, try new things, and learn from past experiences. We look for team members who can collaborate with others, challenge the status quo, understand the bigger picture, and make good decisions. We strive to help our employees achieve personal goals while contributing to the overall team effort. Reasonable accommodations will be made for applicants with qualified disabilities. All applicants must successfully pass a criminal background check and pass a drug test prior to commencing employment.

Compensation

Compensation is fair and competitive, and the company offers an attractive benefits package.

Contact

Interested? Contact MidAmerica by emailing Careers@myMidAmerica.com to apply.