

Lori R. Adler

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Summary

A dynamic Senior Consultant overseeing a multi-million dollar book of business, I have always been committed to developing my management and relationship skills. I am always open to new and exciting professional experiences to enrich myself and further my career goals. I also cherish and aim to create opportunities to mentor and support others so that they may develop their careers as I have.

Proficiencies and Accomplishments

- Ability to adapt to rapidly changing business environments, as demonstrated by experience leading a virtual team.
- Success working independently and in team environments.
- Highly effective in managing time and resources to meet deadlines.
- Consistently exceeds all metrics and standards, including meeting or exceeding profit margin goals.
- Strong record of up-selling cost-effective products to current clients and closing new client sales.
- Works effectively with all departments in order to integrate and install new products and elected client programs.
- Skilled in navigating the ever changing landscape of Healthcare Reform.

Leadership

- Develop and facilitate a large-scale departmental project to form two distinct teams of account managers, in order to service two corresponding market segments.
- Analyze and determine department budgets, as well as approve all salary increases.
- Responsible for addressing staffing needs of account managers and support staff including hiring and determining compensation and benefits.
- Coordinate and implement new account management strategies.
- Design and implement a training program for new account managers, including a curriculum on HIPAA compliance.

Employment History

USI Insurance Services LLC

April 2012 – March 2014

Senior Consultant

New York, NY

- Oversee a large book of business, building and maintaining relationships with clients to develop individualized strategies for the provision of medical, dental, life, AD&D, and LTD coverage.
- Educate clients on health-care reform compliance measures, identifying opportunities to minimize vulnerability and exposure to penalties for non-compliance.
- Produce cost-benefit analyses to recommend the least burdensome pathways to maximizing coverage.
- Maintain strategic relationships with medical, dental, and ancillary carriers in order to achieve best renewal outcomes for clients.

Medco Health Solutions

April 2007 – April 2012

Account Executive

Montvale, NJ

- Maintained a book of business with A-list clients valued at 60 million dollars in cumulative pharmacy spend.
- Consistently high rate of client retention.
- Responsible for installing new client programs from beginning to successful final installation.
- Direct principal contact with benefit administrators and decision-makers to ensure client satisfaction and renewal.
- Advised clients on how to stay within budget while achieving minimal employee disruption during benefits acquisition.
- Selected to serve as stakeholder on process improvement and leadership committees within Medco to advance the company's strategic plans.
- Maintained high customer satisfaction scores on Medco's annual "Voice of the Customer" surveys.
- Managed and resolve benefits issues for Fortune 500 companies.
- Developed and maintain relationships with brokers and consultants.
- High up-sell rate of additional Medco programs with existing clients.
- Key contributor in sales finalist meetings for prospective clients.
- Retained and renewed accounts responsible for financial analysis to assist clients in managing their pharmacy and health benefits effectively.

Oxford Health Plans, a United Healthcare Company

Sept. 1995 to March 2007

New York, NY

Team Leader, New York Account Management, June 2001 to March 2007

- Managed and led Key Account Team of account managers in New York City.
- Managed and led a team of Administrative Assistants in New York City.
- Proactively mentored Account Managers to assist them in reaching their professional goals.
- Responsible for managing all escalated issues, and instrumental in coordinating information from other departments within the company
- Collaborated with account managers and sales to strategize and service some of Oxford's largest accounts.
- Led team of account managers to enhance performance to meet their goals and objectives.
- Monitored team members' performance to create plans to achieve individual goals.
- Empowered to make policy exceptions and medical authorizations for the client as needed.
- Served on committees to participate in improving internal processes.
- Strong internal resource for Account Management and Sales.

Senior Account Manager, June 1999 – June 2001

Account Manager, November 1997 – June 1999

Dedicated Group Service Manager, February 1997 – November 1997

- Responsible for developing and maintaining Customer Service Team of twenty representatives.
- Played a lead role in coordinating and implementing the delivery of high-quality service to Account Management including by maintaining good relationships within the company to reach common goals.

Team Mentor and Supervisor for Pilot Program, September 1996 – February 1997

- Directly involved in establishing and executing pilot programs designed to enhance performance of newly trained Oxford Phone Representatives.

Customer Service Representative

September 1995 – September 1996

Licenses:

- NYS Life
- NYS Health

Education

Kaplan University
Bachelor of Science in Business Administration, with an emphasis in Healthcare.

References furnished upon request.