

Carrier:
Name: Account team member's name and title

1. Understanding of the Exchange business needs	1	0.5	0
a. Understands the purpose of the Exchange, including laws, policies, and mission			
b. Understands the Exchange's organization, culture and core values			
c. Demonstrates knowledge of political, social and economic issues affecting the Exchange			
2. Understanding of products and services provided to the Exchange enrollees	1	0.5	0
a. Demonstrates a clear understanding of the Standard Benefit Designs			
b. Understands the Exchange appeal process			
c. Follows all polices set by the Exchange			
3. Communication	1	0.5	0
a. Expresses questions and ideas clearly and concisely			
b. Ensures regular communication takes place with the Exchange Plan Manager			
c. Keeps the Exchange Plan Manager involved in all communication			
d. Has a single point of contact who reaches out to the Exchange for all matters to keep the communication accurate			
e. Understands the provisions of the Exchange Contract and agrees to resolve issues at the lowest level			
f. Does not make requests for information that are not pertinent to the task or goal			
g. Alerts the Exchange Plan Manager immediately upon identifying problems or concerns			
h. Keeps the Exchange staff involved and informed about operational changes that affect the Exchange			
i. Makes attempts to coordinate efforts when multiple Exchange staff are involved in the same or similar task			
j. Comes to meetings prepared			
4. Responsive to the Exchange's issues and requests	1	0.5	0
a. Follows through on commitments, responds timely to Exchange requests and meets deadlines			
c. Respects the confidentiality of information shared between the Carrier and the Exchange			
d. Ensures a backup staff person is available to cover for extended absences			
e. Elevates issues appropriately when not resolved at the lowest level			
f. Rapidly adapts to new information, changing conditions, or unexpected obstacles			

g. Ensures requests for system changes are communicated to the Exchange Plan Manager to allow lead time for implementation			
h. Provides timely responses when resolving customer service issues and prioritizes escalations			
5. Provides information accurately and efficiently	1	0.5	0
a. Takes steps to validate information before submitting to the Exchange			
b. Follows up and responds timely if there is additional information needed			
c. Follows templates and instructions provided by the Exchange to assist with specific enrollment requests			
d. Follows the Exchange Reconciliation Process and provides accurate responses in the time frame requested by the Exchange			
6. Demonstrates honesty, integrity, and credibility	1	0.5	0
a. Behaves in an honest and trustworthy manner			
b. Shows consistency in words and actions			
c. Models high standards of ethics			
d. Fosters an environment conducive to open, transparent communication among all levels			
e. Demonstrates a high level of commitment to superior customer service			
7. Demonstrates forward thinking	1	0.5	0
a. Anticipates possible problems and develops contingency plans in advance			
b. Notices trends and develops plans to prepare for opportunities or problems			
c. Confers with the Exchange staff to test new ideas			
d. Maximizes partnership opportunities to improve joint processes and streamline operations			
Subtotal			
Total			