



POSITION DESCRIPTION

POSITION TITLE: Sales & Agency Support Manager

REVISED: May 2021

FLSA CLASSIFICATION: Exempt

SUPERVISOR'S TITLE: President

POSITION PURPOSE:

The Sales & Agency Support Manager oversees agency functions and assists business development for sales and marketing.

ESSENTIAL FUNCTIONS:

Essential functions include the following. Other duties may be assigned.

Leadership:

- Provide administrative and general professional guidance. Mentor and develop internal staff and direct reports as appropriate
- Lead one-on-one meetings with direct reports, communicating information back and forth from direct reports to management
- Monitor workload of direct reports and reallocate tasks and functions as needed
- Establish periodic goals for reporting departments with guidance of supervisor; communicate goals and assist each direct report in setting individual goals
- Create and deliver timely performance reviews for direct reports and assist in providing feedback to other managers in organization for their direct reports' reviews
- Assists Senior Management with various duties, projects, and initiatives as requested
- Oversee process improvement initiatives and related administrative and operational functions
- Incorporate department-specific feedback from client satisfaction surveys into department initiatives

Communication & Customer Service:

- Manage underwriting process for individual and group benefit plans, including gathering of initial data, submitting to carriers, follow-up requests for information, and obtaining quotes
- Communicate with applicants regarding significant personal health information to facilitate timely and thorough completion of applications. Audit application information received and proactively seeks additional data when needed
- Communicate with vendors to answer questions and gather additional data
- Collect quotes, analyze rates and options, and prepare presentation for licensed agent to present
- Manage renewal process for existing individual and group benefit plans, including communication of renewal information and providing consultative guidance to

- plan users
- Serve as primary point-of-contact with benefit vendors to investigate benefit enrollee issues or other internal staff questions
- Proactively follow up with prospects to assist in the close of the sale

Administrative Support:

- Gather required data from sales and/or prospects to create accurate proposals, and independently create written and electronic proposals and presentations
- Create, analyze, and report spreadsheets of statistical information related to sales, marketing and/or benefits underwriting
- Oversee organization and maintenance of sales and agency software, product catalogs, and files. Files correspondence and other records as needed
- Produce regularly scheduled sales and marketing reports
- Lead support of the sales process for accounts as requested

QUALIFICATION REQUIREMENTS:

EDUCATION and/or EXPERIENCE:

- Associate's Degree required, preferably in business, sales, insurance; or an equivalent combination of education and experience
- 5 years of experience in a team sales environment, insurance agency, or related position

LANGUAGE SKILLS:

- Ability to effectively communicate (oral and written) with both internal and external customers

CERTIFICATES, LICENSES, REGISTRATIONS:

- Must have a valid U.S. driver's license and proof of insurance
- Active life and health license required

TECHNICAL/COMPUTER SKILLS:

- Moderate to advanced experience with Microsoft Office, including Outlook, Word, Excel and PowerPoint
- Ability and willingness to effectively use other job-related technology tools for communication and screen-sharing when needed
- Documentation scanning

OTHER SKILLS and ABILITIES:

- Above average attention to detail necessary to ensure all paperwork processed is complete, accurate and compliant with applicable policies and procedures
- Excellent phone etiquette
- Excellent verbal and written communication skills. Possess exceptional interpersonal communication skills
- Able to work with minimum supervision
- Strong customer service skills and customer-oriented approach to job performance
- Organizational skills are critical
- Conflict and relationship management skills are required
- Ability to work on multiple projects simultaneously with frequent interruptions

PHYSICAL DEMANDS:

- Frequent walking, standing, sitting within the work area and between clients
- Driving to/from client sites and/or other locations for business-related purposes

WORK ENVIRONMENT:

- The work environment is that of a fast-paced office with minimal to high noise levels
- This position requires working independently, as well as part of a team
- This position requires verbal and face-to-face contact with others on a daily basis
- Frequent use of a computer is necessary
- This position requires the use of all general office equipment
- The position requires client information be maintained appropriately confidential
- Telework available if approved by management

The essential duties, knowledge, skills, abilities, work environment, and physical demands described above are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Please read carefully and check one of the choices below:

- I have reviewed the job description above. I can perform all of the essential functions of the job.

- I have reviewed the job description above. I can perform all of the essential functions of the job with the following reasonable accommodations:

Print employee name: _____

Employee Signature: _____

Supervisor Signature _____

Date: _____