

Greater Cleveland Partnership Position Description

POSITION TITLE: Inside Sales/Lead Generator Specialist

DIVISION: COSE Sales

REPORTS TO: Senior Director, Sales

FLSA CLASSIFICATION: Non-Exempt

POSITION SUMMARY:

The Inside Sales/Lead Generator Specialist (LGS) is primarily responsible for prospecting, lead generation, follow-up, opportunity management and conversion. Work as part of an integrated sales team with specific goals and responsibilities. Must work collaboratively with team members to advance sales and drive revenue growth. Responsible to assist in meeting or exceeding departmental goals including membership sales and health insurance. Assist in cross-selling clients on all COSE offerings, including, but not limited, to workers' compensation, HR benefits, networking and educational events. Perform other duties, as assigned, to enhance the overall efficiency, effectiveness, and productivity of the team.

ESSENTIAL FUNCTIONS:

- Contact and acquire business leads for small businesses within the 1-99 employee size via telephone, email or personal contact for the Insurance/Membership Account Executives (IAE) and Membership Account Executives (MAE).
- Meet individual/team goals and objectives and contribute to group goals for department sales as set by the Senior Director of Sales.
- Manage lead, prospect and member data with the specified information forms as required.
- Schedule appointments in assigned territory or campaign for IAEs and MAEs and update database and calendars appropriately.
- Make follow-up calls as required to establish contact and engage in product offerings by developing solutions.
- Manage relationship with specific book of business of current members. Engage member and complete touch points per requirements of COSE member engagement program providing a deeper connection to COSE for the member and working to identify and deliver the best combination of resources for the member's needs to increase the value they receive from the organization, support retention of the member and generate referrals for additional member prospects.
- Research various publications for additional leads
- Assist Sales Administrator as back-up for daily operational functions.
- Maintain awareness of chamber activities and resources by maintaining strong relationships with other staff members (marketing, events, etc) and participating in regular methods of communication within COSE.
- Other job-related duties as assigned.

COSE ESSENTIAL FUNCTIONS:

- Ensure focus on COSE core values (Sincere, Helpful, Accessible, Resourceful, Responsive) as part of COSE “Member First” Approach.
- Attend COSE University trainings and complete COSE University coursework in a timely manner to ensure and maintain current knowledge of COSE services, products, programs, engagement skills and expectations.
- Document and track all member engagements in the CRM.
- Attend both COSE and external events as required to engage with prospects and members.

PREFERRED EDUCATION, EXPERIENCE AND SKILLS:

- Ohio Health Insurance Licensed, strongly preferred
- High School degree or equivalent required. College degree preferred
- Minimum of two years previous experience in telemarketing, appointment setting or sales required.
- Must be organized and detail oriented.
- Strong oral and written communication skills. Ability to correspond and communicate effectively with prospects and members regarding membership features and benefits.
- Experience working with small business owners
- Experience with a membership organization
- Ability to work in a fast paced environment.
- Professional demeanor and presentation of self with an outgoing personality.
- Proficiency in Microsoft Office Package (Word, Excel, Access, and PowerPoint) and Microsoft Outlook.
- Bilingual or proficiency in Spanish a plus.

PHYSICAL REQUIREMENTS:

- May be required to work more than 8 hours during a workday
- Some driving may be required
- Setting up display booths
- Light to medium lifting may be required
- Sitting for long periods of time

SCHEDULING REQUIREMENTS:

- Must be available during standard business hours
- Must be available to work occasional off-hours
- Incumbent has limited flexibility to schedule activity with the approval of supervisor
- This position may not be performed from a remote location except in special pre-approved circumstances.