

## **GREATER CLEVELAND PARTNERSHIP POSITION DESCRIPTION**

**POSITION TITLE:** Insurance/Membership Account Executive

**DIVISION:** COSE Sales

**REPORTS TO:** Senior Director, Sales

**FLSA CLASSIFICATION:** Exempt

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### **POSITION SUMMARY:**

The Insurance/Membership Account Executive (IAE) is responsible for attracting and securing prospective non-member businesses by communicating the benefits of COSE's products and services primarily with the health insurance product portfolio by targeting small businesses with 1 – 99 employees. Provide a consultative selling approach and create competitive analysis of our product line offered by Medical Mutual of Ohio (MMO). Responsible for meeting or exceeding departmental goals including health insurance and membership sales. Serve as a representative of GCP and COSE at external programs and events. Cross sell 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, acquire and sell small businesses with 1 to 99 employees the advantages of COSE's products and services not limited to membership.
- Provide a consultative product approach to create an innovative solution that best fits the needs of each individual client within our health insurance product lines.
- Ability to initiate and close the sale.
- Develop relationships through prospect development initiatives including but not limited to cold calling and face-to-face meetings.
- Strong working knowledge of health care benefits and products to ensure that the client's needs are identified and the appropriate insurance benefits options are presented.
- Clear understanding of insurance underwriting guidelines and the ability to recognize missing or incomplete information on the application.
- 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.
- Contribute to continuous process improvement within the organization.
- 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 MINIMUM EDUCATION, EXPERIENCE AND SKILLS:**

- Licensed (health and life insurance) as required by State of Ohio laws. (Must be completed within 60 days from date of hire.)
- Bachelor’s Degree or equivalent of highly successful selling experience required
- Excellent oral, written and interpersonal skills
- Demonstrated organizational skills
- Self-directed with an ability to positively influence decision makers
- Self-motivator, self-confident, goal-oriented and driven
- Ability to show empathy to prospects and exercise sound judgment
- Ability to manage several products and a large customer base simultaneously
- Experience with quoting software and reports
- Proficient in Microsoft Office Package (Word, Excel, Access, PowerPoint and Outlook)
- Experience working with small business owners and/or a membership organization
- Bilingual in Spanish a plus

**PHYSICAL REQUIREMENTS:**

- May be required to work more than 8 hours during a workday
- Sitting for long periods of time
- Local travel/driving required within the eight county region of Northeast Ohio
- Significant manual dexterity for keying in data for long periods of time

**SCHEDULING REQUIREMENTS:**

- Must be available to work occasional off-hours
- Must be available during standard business hours
- Incumbent has the flexibility to schedule activity with the approval of supervisor
- Aspects of this position may be performed from a remote location with the approval of supervisor.