

GREATER CLEVELAND PARTNERSHIP

POSITION DESCRIPTION

POSITION TITLE: COSE Membership Account Executive (MAE)

DIVISION: COSE Sales

REPORTS TO: Senior Director, Sales

FLSA CLASSIFICATION: Exempt

POSITION SUMMARY:

The Membership Account Executive (MAE) is responsible for attracting and securing prospective non-member businesses by communicating the benefits of COSE membership by targeting small businesses with 1-99 employees. Provide a consultative selling approach by identifying the needs and cross-selling the COSE offerings, including, but not limited to, workers' compensation, HR benefits, networking and educational events. Responsible for meeting or exceeding departmental goals including membership sales and health insurance. Serve as a representative of GCP and COSE at external programs and events.

ESSENTIAL FUNCTIONS:

- Contact, acquire and sell membership to small businesses between 1 and 99 employees the advantages of COSE products and services.
- Achieve both revenue and new membership departmental sales goals.
- Generate cold calls by actively seeking new businesses and completing follow-up appropriately.
- Maintain and pursue new memberships developed in conjunction with the organization's initiative to advance market share in specific segments identified each quarter and in long-term yearly initiatives.
- Learn and possess a general understanding of COSE's health insurance process.
- Maintain and manage prospects by developing relationships with Insurance Account Executives.
- Manage the member application process and any necessary follow-up for the member.
- Manage geographical territory by implementing a plan of action and engage businesses with solutions by using a consultative selling approach.
- Manage relationship with specific book of business and 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.
- Manage leads, prospects and member information by updating database accordingly.
- Attend programs, educational events and networking events sponsored by COSE marketing and events and engage members and prospective members with our benefits.
- Maintain awareness of activities and resources by building strong relationships with other departments.
- Complete necessary administrative duties including but limited to: call reports, expenses, preparing membership packets, etc.
- 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:

- College Degree preferred.
- Minimum of two years sales experience in the small and mid-sized business market. Experience with membership, service or other intangible products would be preferred.
- Licensed in Health and Life Insurance as required by the State of Ohio laws (Must be completed within 6 months from date of hire)
- Proficiency in Microsoft Office Package (Word, Excel, Access, and PowerPoint) and Microsoft Outlook.
- Experience with computer based sales and lead management tools.
- Strong oral and written communication skills. Ability to correspond and communicate effectively with prospects and members regarding membership features and benefits.
- Excellent phone and verbal communication skills and ability to maintain a professional and courteous demeanor with internal and external customers. .
- Detail oriented with the ability to independently manage multiple tasks and priorities.
- Willingness to spend all day, every day interacting with prospects, members and other staff via phone and in person.
- Professional, self starter with ability to work towards objectives with a high degree of autonomy.
- Experience working with small business owners
- Experience working in a membership organization
- Bilingual in Spanish a plus.

PHYSICAL REQUIREMENTS:

- May be required to work more than eight hours during a workday
- Sitting for long periods of time
- Travel/driving required within 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 (very limited) flexibility to schedule activity with(out) the approval of supervisor
- Aspects of this position may be performed from a remote location with the approval of supervisor.