

Greater Cleveland Partnership Position Description

POSITION TITLE: COSE Sales Administrator (Membership and Insurance)

DEPARTMENT: COSE Sales

REPORTS TO: Sr. Director Sales

FLSA: Exempt

POSITION SUMMARY:

The Membership/Insurance Sales Administrator is an integral member of the COSE Sales Department who assists the Senior Director, the Membership Account Executives (MAE) and the Insurance Account Executives (IAE) to increase productivity and achieve business objectives and day-to-day operations.

ESSENTIAL FUNCTIONS:

- Provide general administrative support to Membership and Insurance Sales Department.
- Generate and distribute weekly and monthly sales reports.
- Work with insurance account executives to determine if assistance is needed in customer follow-up and provide such assistance as needed.
- Serve as point of contact for inbound sales queue.
- Verify all premiums to generate sales commission reports.
- Responsible for the timely entry of insurance data into all COSE and MMO data systems.
- Manage insurance sales prospecting lists under direction of senior director.
- Support application process by scrubbing all applications; notify customers and account executives of any missing information required by underwriting to obtain rates.
- Submit all groups to underwriting to obtain final medically underwritten rates.
- Maintain member data in membership database as directed by department staff.
- Ability to provide service, sales and engagement opportunities within geographic footprint.
- 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.
- Serve as back-up to any account executives out of the office which requires ability to assess client needs and complete all steps required for sales completion.
- Provide phone support for department.
- Maintain procedural documentation for all positions within the department.
- Responsible for departmental supplies.
- Other job-related functions 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. High School diploma required.
- Health insurance license a plus.
- Must be organized and detail oriented.
- Ability to handle an array of personalities
- Strong computer skills: proficient in Word and Excel and some proficiency database programs
- Proficiency in Spanish a plus

PHYSICAL REQUIREMENTS:

- May be required to work more than 8 hours during a workday
- Limited travel/driving required
- Sitting for long periods of time
- 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
- Certain aspects of this position may be performed from a remote location with prior approval from supervisor.