

JOB TITLE: Proposal Coordinator – Employee Benefits

REPORTS TO: Vice President

FLSA STATUS: Exempt



POSITION:

Proposal Coordinator - Employee Benefits

Summary

Supports the proposal development process with the design and development of information and materials on a variety of insurance products for Agents and Account Managers to present to Client and Prospects.

Essential Duties And Responsibilities

- Request new and renewal quotes for Accounts from carrier per RFP.
- Review quotes/rates to ensure accuracy and completeness.
- Negotiate rates with carriers at the direction of the Advisor or Account Manager.
- Coordinate and analyze information on spreadsheets and present best options for client to Advisor and Account Manager.
- Create marketing reports and graphs to support client presentation.
- Build rapport with carrier representatives and responds to email inquiries in a timely manner.
- Provide education on industry changes and specific carrier changes to client.
- Other duties as assigned.

Additional Responsibilities

- Participate in internal Pre-Renewal meetings.
- Assemble presentation material for meetings.
- Prepare pre and post executive cost summaries
- Assist Account Manager and Service Representative with enrollment paperwork and other duties.
- Learn new software programs as needed.
- Attend all scheduled team and staff meetings.
- Attend educational and product seminars.
- Participate in special projects as required.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Critical Thinking – Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

Client/Quality Focus – Anticipate, monitor and meet the needs of clients, and demonstrate a personal commitment to identify clients' business needs and continually seek to provide a trusted advisor level of service.

Adaptability – Adjust scheduled work to accommodate an ever-changing environment; Triage the multiple demands and competing priorities by gathering relevant information and applying critical thinking skills; Seek wisdom and insight from SSG team members when needed.

Teamwork - Balance team and individual responsibilities; Exhibit objectivity and openness to others' views; Provide and be acceptant of feedback; Contribute to building a positive team culture; Support the organization as well as your teams' efforts to succeed.

continued

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Communication – Communicate effectively and persuasively in any situation - verbally and in writing; Thoroughly digest and interpret information and request clarification when necessary; Listen carefully and respond to questions and communications concisely; Share knowledge and ideas and collaborate effectively with others; Actively participate in meetings.

Dependability - Follow instructions and respond to management direction; Take responsibility for your own actions and follow-through on commitments; Be willing to commit to extended hours of work for required client deadlines and/or to achieve work-related goals; Complete tasks and projects on time and notify appropriate contact if an alternate plan is necessary; Work independently, accept accountability, set personal goals, remain focused under pressure, be acceptant of change when necessary, and meet attendance/punctuality and responsibility requirements.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty at a high level. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Education and/or Experience

- Associates Degree and 1-2 years related experience.
- Insurance industry experience preferred.

Soft Skills

- Demonstrates effective leadership, creativity, and problem-solving skills and adapts to working within a team.
- Excellent oral, written and organizational skills.
- Ability to efficiently organize work and manage multiple competing priorities in order to meet client deadlines.

Computer Skills

- Excellent computer skills including word processing and spreadsheet expertise
- Experience working in MS Office Suite, in particular Excel and PowerPoint
- Brokerage Builder / ZyWave software experience
- Experience with reporting dashboards and plan comparison software is preferred.
- General use of standard office equipment, such as computer, keyboard, calculator, printer, etc.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this Job: employee is regularly required to sit; use hands to type as well as speak and hear. The employee occasionally stands and walks. The employee must occasionally lift and/or move up to 20 pounds. Specific vision abilities required by this job include having the ability to focus on computer screen and paperwork and work on a computer for a prolonged amount of time.

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