

Sales Coordinator

Assists Account Executives and brokers with all aspects of servicing and preparing client proposals and to assist with communication materials such as client presentations. Reports to V.P. of Operations.

Responsibilities:

- Serve as liaison between broker and Account Executive regarding day-to-day client contact and customer service
- Review, organize and oversee workflow of all business processing including preparation of Requests for Proposal (RFPs), and quotes and developing solid relationships with insurance carrier representatives.
- Develop knowledge of carriers and products offered; analyze quotes
- Prepare bid specifications for RFPs; scrub and analyze client census data and prepare for approval; release RFPs to carriers and follow up to assure timely responses; field questions from carriers to assist them in providing quotes; review quotes for accuracy and to insure they meet RFP specifications
- Responsible to ensure quotes meet guidelines, communicating any changes to guidelines to the department personnel.
- Assist in preparing client proposals for approval by Account Executive; help determine proposal content; proof all proposals for accuracy
- Review with brokers and assist in making informed carrier choices and rate plans
- Update carrier guidelines and ratings in internal proprietary software system to incorporate changes as needed
- Manage and resolve more complex customer requests and complaints

Qualifications:

- 2-5 or more years of experience in Group underwriting
- Ability to read, analyze, and interpret commonly-used concepts, practices, and procedures within the industry and maintains a general knowledge of carrier product lines.
- Knowledge of actuarial and statistical practices related to underwriting
- Ability to work with mathematical formulas
- Excellent oral and written communication skills
- Effectively make timely decisions in the absence of specific direction
- Ability to type 35-40 wpm w/knowledge of Windows based computer systems, including Word, Excel and Outlook.
- Wide degree of creativity and latitude is expected
- AZ licensed in life and health
- HS graduate + some college