JOB DESCRIPTION
Customer Development & Retention Manager

Department: Customer Development
Reports to: President

GENERAL DESCRIPTION:
The Customer Development & Retention Manager is a results-driven individual who will be responsible for overseeing the operations of the in-house insurance agency, including sales, customer service, compliance and administrative functions for group, Individual Medicare and Under 65 health products, as well as ancillary and other products offered. The Customer Development & Retention Manager will help develop and ensure that the in-house agency meets its sales and retention goals and maintains the highest levels of customer satisfaction, quality and compliance. It is imperative that the Customer Development & Retention Manager has stellar people leadership skills, and a demonstrated decision-making ability required by day-to-day management, including establishing sales goals and ensuring each team member contributes to the overall objectives. The successful candidate will be an achievement oriented that demonstrates problem-solving skills with the ability to reach a solution in situations where there may be multiple options and prioritization needed.

This is an exempt position and may require hours that exceed a standard 40 hour workweek.

KEY RESPONSIBILITIES:
- Develop and maintain a high technical competency for all products and services available within in-house agency;
- In concert with corporate objectives, identify and operationalize innovative approaches to improve sales, retention, implementation and on-going service through processes, procedures and effective utilization of agency management system for in-house agency;
- Lead key business development strategies including diversification, account targeting and cross-selling;
- Leadership responsibility for team members, including promotion of teamwork, continued evaluation of staffing levels, performance management, proactive coaching and mentoring, and team and/or individual training;
- Utilize strong selling skills and consultative sales behaviors to develop and understand customer needs to meet and exceed sales growth and retention targets;
- Ensure adherence to all industry compliance requirements;
- Develop and implement bold new ideas that will help set and achieve team and company-wide goals, moving us forward;
- Monitor and measure team performance and alignment with corporate direction using analytics/statistics and reporting in support of evaluating corporate direction;
- Personally ensure high levels of quality, client satisfaction, and employee satisfaction;
- Travel may be required.

COMPETANCIES:
1. Account Management Business Acumen
2. Change Agent
3. Collaboration Skills
4. Communication Proficiency
5. Decision Making
6. Initiative
7. Leadership
8. Problem Solving/Analysis
9. Results Driven
10. Diversity and Inclusion
11. Presentation Skills
12. Teamwork Oriented

EXPERIENCE & REQUIREMENTS:

- Bachelor's degree in Business Administration or similar discipline;
- Minimum of 5 years proven management and leadership experience, with demonstrated experience leading account management functions;
- Must have a customer centric mindset with B2C experience;
- Ability to establish relationships in the local brokerage community is mission critical;
- Deep understanding of agent/ broker's marketing and distribution strategies;
- Experience with business development, client engagement and relationship management skills including account rounding, retention relationship management, and business development skills;
- Proficient in day-to-day Insurance business and workflow processes;
- 5+ years' experience with agency management systems or Agency Management System software experience, internet software, spreadsheet software and word processing software experience; AgencyBloc preferred;
- Experience contributing to company growth of small to mid-size businesses;
- Health insurance industry experience a plus, particularly knowledge of agencies in the small to mid-size group and individual health benefits space;
- Solid management, administrative and human relations skills in a style that exhibits maturity, leadership, and teamwork;
- Demonstrated experience and focus on delivery of exceptional customer service experiences through a comprehensive consultative, relationship building approach;
- Must have sales training and hands-on experience with solutions, consultative, strategic and/or conceptual selling.