



Custom Design Benefits

Department:

Sales

Job Title:

Sales Support Specialist

Reports to:

Vice President, New Business
Development & Compliance

Job Summary: *The following statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.*

The Sales Support Specialist is primarily responsible for supporting the Sales and Account Managers in generating new business and renewing existing accounts for service lines (medical, dental, vision) through organizing and requesting information relative to RFPs received and renewals, identifying viable prospects, development of strong insurer and network relationships, and securing competitive stop loss bids. The Sales Support Specialist is also responsible for entering RFP, renewal, opportunity, and broker information into Salesforce and assists in creating close strategies with the Sales and/or Account Manager.

Essential Functions:

- Coordinate request for proposal process from receipt of RFP through sale of product/service and renewals. This includes, but is not limited to:
- Review of initial RFP materials to determine missing information and barriers to stop loss.
- Discussion with sales manager to understand strategic sales direction or if internal declination protocols apply.
- Communication with broker/agent to obtain missing and additional competitive information.
- Entry of all relevant data and milestones in Salesforce and archive creation for all RFP documents relating to open prospects in shared network location.
- Select appropriate partner markets from which to request proposals based on partner market strengths, understanding of the prospect group, and sales strategy. Organize, prepare, and submit RFP information to selected markets. Respond to follow-up inquiries as necessary.
- Review of bids from partner stop loss markets for accuracy, consistency of terms with those requested alignment with sales strategy, and competitiveness.
- Prepare proposal/Summary of Benefits (if we build a TC plan based on their current benefit) and provide to sales manager and broker within allotted time frame. Formal written proposals with extensive background documentation may be required. Additionally, ASO proposals and ancillary proposals (i.e. COBRA) will be required.
- Respond to follow-up inquiries concerning stop loss quotations from sales manager and/or broker.
- Provide feedback on competitiveness of stop loss proposals, in price and provisions, to partner markets.
- Ensuring that preferred carriers maintain appropriate turnaround times and proper rating on renewal and quotes. Also, may include providing preferred carriers with feedback regarding operating standards CDB has set and strategy development to increase closing ratio and sales of renewal business and vetting new stop loss partners.
- Review and identify members for whom the underwriters will want updated status on condition and treatment plan while underwriting a renewal and take appropriate steps to obtain the medical updates in a timely manner using the ticket process.
- Responsible for all aspects of the stop loss renewal on current inforce business. Providing the best renewal and renewal options available.
- Shopping for competitive Stop Loss Insurance by providing timely reporting for client renewals including negotiations. This process includes analysis of PBM and PPO arrangements as well as plan design and broker consultation, generation of COBRA rates, completion and coordination of all paperwork and forms for implementation of stop loss, CDB internal notifications and providing client and broker feedback.
- Ability to understand stop loss contractual provisions, network, PBM and financial, plan design information and bring those elements in to the underwriting process.
- Ability to anticipate and understand the unique needs of our sales partners and develop strong working relationships.
- Support the post-sale and renewal process through assistance with stop loss binding, disclosure and coordination/completion review for accuracy of all documents required for implementation of stop loss and preparation of ASA.

- Effectively utilize Salesforce by entering accurate and timely information updates, documentation of milestone events, and assigning necessary tasks for project workflow. Create new and utilize existing report templates within Salesforce to track prospect status, provide feedback to brokers and partner markets, and maintain organization of ongoing work/tasks. Salesforce entry also includes building accurate rate sheets to enable Finance to Invoice and provides other departments contractual information they need to build reports / enter data into the claims system. Rate sheet includes administration, stop loss, and ancillary lines.
- Develop and maintain positive working relationships with both internal and external stakeholders, including but not limited to Sales Managers, Account Managers, stop loss partners, brokers, and analysts.
- Provide marketing support and feedback for the development of new or enhanced products and services. Assist in updating proposal documents and marketing materials to include new product and service information.
- Create and maintain a library of policies and procedures for standard tasks, ensuring continuity of information and documented training materials are available.
- Peer review of proposals for accuracy and clarity, ensuring shared knowledge of current prospects and superior communication in external proposals.
- Other duties as assigned.

Essential Skills and Experience:

- Understanding of self-funding and third-party administration including, but not limited to stop loss, all components of health benefits, plan design, FSAs, HRAs and HSAs, wellness, and COBRA, preferred.
- Prior Underwriting experience preferred.
- MS Office proficient, with exceptional Excel capabilities.
- Highly organized and detail-oriented self-starter, having the ability to work with little direction.
- Able to manage multiple projects concurrently, with the capacity to prioritize and deliver accurate and timely results.
- Excellent oral and written communication skills.
- Advanced problem solving and critical thinking skills, with a strong mathematical proficiency.
- Strong sense of urgency and customer focus, including a consultative approach to customer service.

Fundamentals: 1. Take Care of Our Clients; 2. Deliver Results; 3. Be a Fanatic About Response Time; 4. Own It; 5. Be a Great Teammate; 6. Honor Commitments; 7. Get Clear on Expectations; 8. Work Smart

StrengthsFinder: Achiever-E; Analytical-S; Arranger-E; Communication-I; Deliberative-E; Positivity-R; Relator-R; Responsibility-E; Self-Assurance-I; Strategic-S

Degree of Supervision: *Close Supervision (Entry Level), Supervision (Independent), General Supervision (Advanced), Direction (Manager), General Direction (Director)*

- General Supervision

Physical Demands and Work Environment: *The physical demands and work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- **Physical Demands:** Job requires sitting up to eight hours a day. Body movement primarily in hand and arm functions associated with normal office activities. Hand and eye coordination, and hand dexterity is required for handwriting and keyboarding over prolonged periods of time. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus. This position requires occasional lifting and/or carrying of no more than 25 pounds, and bending, squatting pushing and pulling.
- **Work Environment:** The noise level in the work environment is usually minimal.

Sales Support Specialist

Success Factors (List at least 2 situations that would designate success.)

Situation:

Obstacle:

Action:

Result:

Situation:

Obstacle:

Action:

Result: