



Custom Design Benefits

Department: Sales	Job Title: Sales Manager	Reports to: VP, New Business Compliance & Sales
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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 Manager is primarily responsible for generating new business for all service lines through the development of strong broker relationships and successful presentation of CDB solutions to prospects.

Essential Functions:

- Successfully establish, maintain and enhance credibility, communications, and relationships with brokers, consultants, employer trusted advisors and employers to generate new business for all lines of service.
- Develop and cultivate relationships with new brokers to ensure continued growth of organization.
 - Strategy development to increase closing ratio and sales
- Be educated on new products and services in order to timely present to brokers and prospects.
 - Including identifying ways for brokers to position CDB products and services to deliver new business
 - Leading, organizing and planning formal presentations and meetings with brokers and their prospects, broker firms, CE courses for brokers, event planning for seminar marketing and presentation of solutions and proposals to clients as needed.
- Conducting regular meetings with broker contacts about prospects, services, solutions and new selling tools to keep CDB top of mind.
- Utilize team sales approach to generate new business
- Successful and timely management of the full sales opportunity lifecycle following the defined sales process:
 - Qualifying prospects through questions and regular interactions with brokers in accordance with the Sale's RACI
 - Regular targeting of employer prospects with key brokers
 - Working with brokers to collect information necessary to finalize competitive proposal
 - Following up with brokers on RFPs to get to finalist or presentation opportunity
 - Providing competitive feedback to stop loss partners
 - Daily maintenance of Salesforce
- Providing support for other sales team members as needed
- Provide weekly internal reporting on activity to management team.
- Prepare custom presentations (by audience) using materials.
- Provide marketing support and feedback for the development of new or enhanced products and services.
- Other duties as assigned.

Essential Skills and Experience:

- Outstanding communication skills
- Knowledge and understanding of self-funding and stop loss
- Knowledge and application of consultative sales approach
- Ability to develop relationships at multiple levels
- Understanding of the significance of the broker relationship and having a desire to constantly enhance that relationship
- Advanced problem-solving skills
- Advanced decision making and critical thinking skills
- Advanced organizational and time management skills
- Computer skills with MS Office software tools, including PowerPoint
- Strong listening and follow up skills
- Strong customer focus and sense of urgency
- Ability to manage multiple assignments simultaneously and completing accurately and timely

- Strong attention to detail
- Ability to work with little direction, a self-starter.
- Ability to prioritize work

Fundamentals: Deliver Results; Communicate Personally; Get Clear on Expectations; Create the WOW; Take Care of our Client; Own It; Be a Fanatic about Response Time; Be Positive and Bring It

StrengthsFinder: Communication-I; Focus-E; Responsibility-E; Restorative-E; Self Assurance-I; Strategic-S; Woo-I; Harmony-R; Achiever-E; Command-I

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

- Direction

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.

Revised 10.2021

Sales Manager

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

Situation: Generating qualified leads across all lines of business.

Obstacle: Reaching employers and brokers to educate on value and solutions.

Action: Develop and partner with brokers and employers through professional networks

Result: Increasing revenue a minimum of 10% each sales year

Situation: Closing sales across all lines of business

Obstacle: Understanding CDB's solutions

Action: Participate in regular Account Management client engagements to understand the solutions CDB provides to be used to find pain points with prospects.

Result: Increasing revenue a minimum of 10% each sales year