Position Outline

Position: Sales Administrator  
FLSA: Non-Exempt  
Department: Sales  
Reports to: Manager – Ancillary Accounts  
Location: Dayton, OH

Position Purpose: 
Provide general administrative and sales support to ancillary sales staff. Provide quality service to agents, brokers and customers.

Nature and Scope of Responsibilities:

General Administration
- Support sales staff with letters, memos, e-mails and reports as needed
- Manage and maintain various data bases and spreadsheets
- Other administrative duties as requested

Marketing Support
- Review and qualify all requests for proposals as directed by the Sales Staff
- Data input all qualified RFP’s into data-base
- Prepare manual rates for all qualified RFP’s
- Provide sales support to agents and brokers
- Group enrollment
- Interact with agents and brokers on a daily basis regarding requests for additional information
- Assist Sales staff with the preparation of client/broker presentations as requested
- Produce and maintain up-to-date weekly prospect activity reports as requested
- Other marketing support duties as requested
- Assist with any IT needs

Qualifications / Requirements:
- College degree preferred or equivalent business experience
- 4+ years of insurance related experience a plus
- Computer literate including MS Office products (Word, Excel, PowerPoint & Outlook).
- Must possess strong organizational and communication skills.
- Must obtain Life Health Agent License within first 90 days of employment

Competencies:
- Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments.
- Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.
- Teamwork - Balances team and individual responsibilities; Exhibits objectivity and openness to others’ views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone’s efforts to succeed.

This position outline reflects the general responsibilities and level of work being performed by employees in this position. It is not intended to be an exhaustive list of all duties, responsibilities and qualifications of employees assigned to this position. Nothing in this position outline restricts management’s rights to assign or reassign duties and responsibilities to this job at any time.

As of February 2019
• **Dependability** - Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments; Commits to long hours of work when necessary to reach goals; Completes tasks on time or notifies appropriate person with an alternate plan.