

Job Title:	Account Executive – Benevise	FLSA:	Exempt
Division:	Insurance	Revision Date:	11/2022

Position Purpose:

The Account Executive - Benevise is a sales leadership position leading the development and growth of the Midwest Heritage employee benefits and communication channel. This channel will provide insurance solutions to insurance brokers and employer groups. We're seeking an experienced sales professional to extend our reach through expert cultivation of new, untapped business opportunities and relationships. The ideal candidate will be trusted to dive right in, take the lead, and use initiative in helping build brand awareness and forming strategic relationships to bring Benevise to brokers and employer groups nationwide.

Essential Functions:

Product and Industry Knowledge

- Group Benefits
- Ancillary Benefits
- Voluntary/Specialty Benefits
- Benefits Administration Systems

New Business Development

- Monitors industry trends and potential customer needs; develops solutions by leveraging existing program offerings and suggesting program enhancements.
- Builds a sales pipeline for the short- and long-term in accordance with targets. Executes sales, revenue, and profit goals.
- Identifies new potential markets and develops new business opportunities.
- Generates new leads, identifies and contacts decision-makers, and screens potential business opportunities.
- Takes lead in developing new business proposals and presentations that create and advance opportunities for new sales.
- Develops value-added insurance services that strengthen our competitive advantage, increase customer retention, and drive additional revenue.

Carrier and Vendor Partnerships

- Builds and strengthens relationships with current carrier partners.
- Works with carriers to develop exclusive programs for our target markets.
- Identifies new carriers to ensure our competitive position in the marketplace; negotiates contracts.
- Works with insurance carriers and other required entities to develop and secure appropriate approvals of marketing collateral.
- Identifies technology platforms to support benefits enrollment, administration and communication, in alignment with program strategies and client needs.

Community and Other

- Presents a positive image of Midwest Heritage and develops key relationships in the market through participation in community and professional activities.
- Maintain and share professional knowledge through education, networking, and events and presentations.
- Reports to work when scheduled and on time; will involve meetings outside of normal business hours.

Secondary Duties and Responsibilities:

Performs other job-related duties and special projects as requested

Knowledge, Skills, Abilities Required:

- Must have a friendly positive attitude and excellent written and verbal communication skills.
- Self-motivation, strong work ethic and the ability to build relationships with internal and external clients will be essential in this position.
- Successful track record in sales and negotiation.
- Experience with CRM software and knowledge of benefits administration platforms.
- Must maintain a high degree of confidentiality.
- PC with Microsoft Word, Excel, Access, PowerPoint, Outlook, and some typing skills needed.

Education, Experience, and Other Requirements:

- Four year college degree.
- At least 5 years of insurance selling experience.
- Understanding of group health plans, ancillary plans, and voluntary plans.
- Familiarity with insurance and customer service best practices required.
- A history of successful sales experience within a professional organization is preferred.
- Current insurance license in good standing with the Department of Insurance and willingness to acquire further certifications or state license if required.

Reporting Relations:

Accountable and Reports to: Executive Vice President, Agency Manager

Supervisor Responsibilities: None

Working Conditions and Physical Requirements:

- The duties of this position are normally performed in a general office setting. This is a fast paced work environment.
- This position is classified sedentary/light and requires the ability to sit for long periods of time.
- There is frequent pressure to meet deadlines and handle multiple projects in a day.
- Visual requirements include: ability to see detail at near range with or without correction.
- Must be able to perform the following physical activities: sitting for long periods, talking (in person and by telephone), hearing and repetitive motions.

Travel:

30%.

Equipment Used:

Computer (PC with Microsoft Office programs), telephone, calculator, telephone, copier, fax, and printer.

Other Position Requirements:

Contacts: This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

Confidentiality: This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.
- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

Employee Name (please print)

Signature of Employee

Date