

**Preferred Health Care**  
**Job Description**

**Job Title: SALES EXECUTIVE**

**Location: Sales in Lancaster, Lebanon, Chester, Delaware, Philadelphia, Montgomery and Bucks counties, PA**

**Office Location: Urban Place, Lancaster PA; Hybrid Work Environment**

**Work Type: Full-Time**

**Reports To: Director of Sales**

**SUMMARY:**

With offices located in Lancaster, PA we are looking for seasoned health insurance sales professionals to work as a Sales Executive. This role will be responsible for rapidly growing membership in our exclusive Eliance Health Solutions product suite (Self-funded Employer Health Plan, Ancillary Coverages, Onsite/Near-Site Primary Care Clinics, and Wellness products) created as a private label offering from Penn Medicine.

Focused on growth, profitability and service, you will develop/execute comprehensive group-specific account acquisition strategies; achieve monthly and annual new sales/retention goals and financial objectives; generate new sales through independent brokers; generate new sales directly as an employer's broker of record without causing conflict with our independent broker network; and partner with internal teams to share data, refine product lines and create new business opportunities and sales around our Self-Funded Employer Health Plan product lines.

We prefer 2-5 years of sales experience, preferably with experience in the health care /managed care industry. A proven track record of sales results. We prefer a current PA license to sell Life & Health Insurance. Preferred Health Care will pay for all continuing education required to maintain licensure. In this highly visible role, candidate must project credibility and competency, and possess the ability to advise decision makers, build relationships and analyze/negotiate details required to win new business.

Must have the ability to work independently, and plan/organize projects based on established objectives. A valid Pennsylvania's driver license is required.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

1. Develops and maintains frequent contact and positive working relationships with select brokers. Develops effective training materials for brokers and delivers training to brokers in ways that increase their knowledge and skill in selling Eliance Health Solutions. Manage, coach and train brokers to increase sales, and improve overall broker's selling skills. Effectively measures the knowledge level of select brokers.

2. Supports brokers in selling select products, programs, and services to employer group clients in excess of established sales objectives. Increases overall plan membership in keeping with annual objectives. Key participant in the creation of the annual Sales Plan that defines growth objectives and the sales activity needed to accomplish them.
3. Provides support for resolution of day-to-day broker, and/or client issues.
4. Liaison with internal team responsible for proposal generation. Responsible for reviewing/delivering/presenting proposals with brokers and/or clients.
5. Identifies targeted prospective employers, assists in the development of benchmarks and projected volume goals for accounts and prioritizes an ongoing consistent broker sales strategy to build membership volumes.
6. Keeps informed on managed care industry including competition, trends, and legislative issues. Maintains a thorough knowledge of associated products, programs and services and recommends improvements or additions to achieve cross-selling goals and generate new business. Participates in planning around sales goals.
7. Responsible for the development of selection and appointment strategy of new agency partners if needed, along with monitoring performance of existing partners.
8. Ensures pertinent information is entered in Customer Relationship Management (CRM) database in a timely and accurate fashion. Recommends improvements to database and processes.
9. Collaborates with company leadership team to create a culture of teamwork, excellent customer service and strategic thinking.
10. Generates company brand and product/service recognition by being highly visible in the business community and maintaining “top of mind presence” with broker partners.
11. Projects a professional image always.
12. Performs other duties as required or assigned.

#### **COMPETENCIES AND SKILLS:**

Demonstrates strong organizational skills and effective oral and written communication skills.

Demonstrates attention to detail and the ability to handle a large book of business independently.

Ability to identify and build key, trusted relationships in the market including broker, prospect, internal team as you work toward achieving sales goals.

**EDUCATION AND/OR EXPERIENCE:**

- Associate or Bachelor's degree preferred.
- Health Insurance / Managed Care Sales experience preferred.
- 2-5 years of sales experience.
- Current PA Life & Health sales license preferred.

Proven track record of beating sales goals.

Very comfortable being "active and present" in the regional business community and excited to meet new people and prospective customers.

Excellent interpersonal, communication, teamwork, presentation, and project management skills required.

Ability to explain complex information in a clear and concise manner. Be detail oriented, motivated and a self-starter with excellent time management skills.

Demonstrated experience with CRM, prospecting, and opportunity management tools/systems, preferably Salesforce.

**WORKING CONDITIONS/PHYSICAL DEMANDS:**

Work is typically performed outside the office in a hybrid telecommuting environment. Periodic work at the home office is required on a schedule to be established with the Director of Sales.

*The specific statements shown in each section of this description are not intended to be all-inclusive. They represent typical elements considered necessary to successfully perform the job.*