

# **Marketing Associate (Small Group)**

**BIS Benefits, Inc.**

**Job Title:** Marketing Associate

**Classification:** Non-exempt

**Reports to:** Account Manager

## **Purpose:**

The Marketing Associate (MA) primarily supports Account Managers (AM) in preparing accurate presentation materials for renewals and prospecting. The MA works “behind the scenes” to support the AM in administrative duties and maintaining accurate data files. This position supports AM working with clients who have less than 20 employees.

Exempt/Not-Exempt: **Non Exempt**

Full-time/Part-time: **Full Time**

## **Essential Job Functions:**

- ⑦ **Support Account Manager in Renewal and Marketing Process**
  - ⑦ Collect and compile all data, such as MHQs (Medical Health Questionnaires-including COBRA) and Census and follow up with carrier and client for missing data or errors.
  - ⑦ Send out RFP (Request for Proposals) and follow up with carrier to assure timely response.
  - ⑦ Review quotes as they come in from insurance carriers confirming accuracy of data including census and medical info.
  - ⑦ Update benefits section annually in Online Benefits Communication portals, once renewal plans have been approved.
  - ⑦ Compile and/or update Group Administrators Guide at renewal and throughout the year as changes are made or pages updated.
  - ⑦ Complete paperwork for client renewal.
  - ⑦ Update the renewal history.
  - ⑦ Notify Service Team that database has been updated with new rates and plan information.
  
- ⑦ **Support Account Manager in Prospecting**
  - ⑦ Prepare neat and orderly Presentation Folders and Overview of Services PowerPoint (PPT) for prospects.
  - ⑦ Request information on group, (copy of renewal, plan information, current rates, and other related forms).

- ⑦ Collect and compile all data, such as MHQs (Medical Health Questionnaires-including COBRA), Census, and Prior Plan Design, and follow up with client for missing data or errors.
- ⑦ Send out RFP (Request for Proposals) and follow up with carrier to assure timely response.
- ⑦ Review quotes as they come in from insurance carriers confirming accuracy of data including census and medical information.
- ⑦ Complete case submission paperwork to carriers.
- ⑦ Notify Service Team that AgencyWare has been updated with new rates and plan information.
  
- ⑦ **Support Account Manager in Open Enrollments, (OE)**
  - ⑦ Prepare and print Benefit Communication Brochure and assure accuracy.
  - ⑦ Order New Hire Kits and Enrollment materials.
  - ⑦ Print and copy plans and forms as needed and when possible, delegate to carriers.
  - ⑦ Schedule carrier reps, wellness partners, or others as needed for OE meetings.
  - ⑦ Prepare PPT OE presentation.
  - ⑦ Coordinate presentation media with client.
  
- ⑦ **Support Account Manager in Updating Client Data**
  - ⑦ Regularly update client, prospect and vendor files in database with proper naming and filing conventions
  - ⑦ Scan all paperwork (case submission, enrollment forms, employer forms, tax and wage, cancellation letter, and other related documents) and file in database
  - ⑦ Rename, consolidate, and delete in order to maintain only pertinent data.
  - ⑦ Manage client paperwork including Business Associate Agreement
  
- ⑦ **Support Account Manager in Administrative Duties**
  - ⑦ Support the Account Manager with the following tasks:
    - o Making phone calls
    - o Answering voice mail
    - o Answering emails
    - o Sending emails
    - o Mailing
    - o Scanning
    - o Handling new paperwork
    - o Other tasks as required

**Working Conditions:**

- ⑦ Primary duties are typically carried out at a workstation in cubicle area.
- ⑦ Small amount of travel may be required to run errands, such as picking up presentation materials or to attend a client or prospect meeting.
- ⑦ Tele-working is permitted, per tele-working policy.
- ⑦ Flexibility to work late or work additional hours is occasionally required in order to complete urgent projects.

**Educational Requirements:**

- ⑦ College degree preferred.

**Work Experience:**

- ⑦ Administrative and Support experience

**Technical Skills/ Abilities:**

- ⑦ High Proficiency in Microsoft Office, particularly Microsoft Excel and Microsoft PPT, is required.
- ⑦ The ability to learn and comprehend new computer software applications, including industry-specific database software, is essential.
- ⑦ Must be able to comprehend and apply basic math.
- ⑦ Excellent phone skills are required in order to communicate with carriers, clients and prospects.
- ⑦ Excellent writing skills are necessary for communicating through letters, emails, and benefit communications.
- ⑦ Editing and proofreading skills are essential.
- ⑦ Professional email etiquette and skills are required to produce consistent professional email communication.
- ⑦ Strong ability to multitask and establish priorities is a key component of this position.

**Physical Demands:**

- ⑦ Must be able to work for prolonged periods at a computer and workstation.
- ⑦ Must be able to compile presentation folders and notebooks.
- ⑦ Must be able to lift and carry 25 pounds.

**Personal Attributes:**

- ⑦ A desire to work in a support role.
- ⑦ A willingness to assist other team members, as needed.
- ⑦ The ability to meet deadlines is essential.
- ⑦ An eye for detail.
- ⑦ The ability to work alone, being self-motivated to complete the job or task with little supervision.

**Though not necessary, the following would be a plus:**

- ⑦ Bilingual

***Position Content***

This description is not intended to be and should not be construed as an all-inclusive list of all the responsibilities, skills or working conditions associated with the position. While it is intended to accurately reflect the position activities and requirements, management reserves the right to modify, add, or remove duties and assign other duties as necessary.

BIS Benefits, a growing insurance firm in Alpharetta, GA is looking for just the right person to serve as our Marketing Associate. If you have the skills necessary to fill this position and you are a responsible and faithful employee, you are invited to

send your resume to BIS Benefits. This is a Full-Time position with set hours Monday – Friday. Starting compensation will range from \$11 - \$14.00 an hour, depending on experience.

If you are interested in this position, please email your resume to [BIS@BISbenefits.com](mailto:BIS@BISbenefits.com). No phone calls please.

In your correspondence, please include:

- Cover letter
- Contact Information
- Resume
- Salary requirements
- DISC or personality testing results, (if available)

**This job listing may not be posted on any website without the expressed written permission of BIS Benefits, Inc.**

BIS Benefits is committed to providing equal employment opportunity for all persons regardless of race, color, religion, sex, age, national origin, disability, or veteran status.

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