

Marketing Associate

Department: Employee Benefits
Reports To: Marketing Manager

Status: Non-Exempt
Revision Date: July 2007

Summary:

Under close supervision, provide analytical services to both renewals and marketing for assigned clients. Develop and maintain strong working relationships with Client Executives of assigned clients.

Essential Duties and Responsibilities:

- Become skilled in the insurance bidding process.
 - Assist Client Executives with insurance carrier selection throughout the bidding process for assigned clients.
 - Analyze insurance proposals, inclusive of rates and benefits, received from carriers.
 - Review the results of the bidding process with the Marketing Manager prior to meeting with the Client Executive and making recommendations based on findings.
 - Prepare the "Request For Proposal" and assist team members and/or assigned mentor throughout policy renewals for assigned clients.
 - Coordinate and prepare materials required for formal client presentations using approved templates and based on discussions with team members.
 - Ensure that final changes are completed and provide formal binders by agreed upon deadlines.
- Perform as a productive team member with other Marketing Associates.
 - Provide back up to other Marketing Associates as needed
 - Share information with other Marketing Associates to create a good network of information.
 - Volunteer to assist in maintaining in-house updates on carrier contacts and products and other necessary "maintenance" type tasks.
- Become knowledgeable in the current trends and issues of the benefits insurance industry.
 - Attend internal client and sales meetings as necessary.
 - Prepare files and other records needed for Barney & Barney.
 - Participate in market research projects and keep abreast of the insurance marketplace.
 - Maintain the professional standards established by Barney & Barney when working with clients.

Education and/or Experience:

- Requires a college graduate or minimum of five years insurance background, specifically in the employee benefits area.
- Obtain and maintain a valid, unrestricted State of California Life & Disability License and meet the continuing education requirements upon completion of training.
- Maintain a valid California Drivers License & a dependable car.
- Proficiency with Microsoft Word, Excel, PowerPoint and Outlook, and the Internet is required.
- Strong math skills required, above average analyzing, problem-solving and planning & organizational techniques are required.
- Must have excellent presentation, verbal and written communication skills, be detail oriented, and have the ability to multi-task.
- Must be dependable and a good team player.

Work Environment and Physical Demands:

- Ability to use computer keyboard and sit in a stationary position for extended periods.
- Work is performed in a typical interior/office work environment.
- Occasional travel by car to/from a client site is necessary.