

# Red Shield Insurance Company

## Job Description

**Job Title:** Marketing Coordinator  
**Department:** Marketing  
**Reports To:** VP Marketing  
**Date:** February 2022

### Company Expectations

All employees are expected to leverage Knowledge, Commitment, Reliability and Service to build industry-leading relationships with our agents and brokers while generating profit for the company. We accomplish this goal by:

- Delivering timely, accurate and personalized service which exceeds industry standards
- Using industry knowledge to protect results and to help our agents and brokers gain valuable insights with their customers
- Leveraging local presence and personal knowledge of our agents and brokers to support mutual growth and profit

### SUMMARY

Participate as a team member and assist in maintaining departmental operations, marketing projects and in achieving corporate goals. Responsible for carrying out action plans and adhering to deadlines. Occasionally assists in particular aspects of complex assignments.

### Essential Functions / Major Responsibilities:

- Agency Support
  - Gain an understanding of insurance marketing, including an understanding of how agencies work and relate to their carriers
  - Assist with managing reports with directives issued by management
  - Deliver strong customer service by responding swiftly and managing inquiries, concerns and requests, performing several calls/day.
  - Assist agents in communicating and understanding company online systems
- Provide support for Marketing VP &/or Rep(s)
  - Assist with identification of potential prospects
  - Schedule appointments
  - Compile necessary reports for visits with agents and submit in a timely manner
- Advertising
  - Complete ad placements for industry publications as requested
  - Create flyers/brochures and make sure that marketing materials are on time and on course for distribution
  - Distribute Marketing materials for approval
- Preparations for conferences and meetings
  - Coordination of invitations and accommodations to attendees
  - Coordination of materials needed
- Learn and demonstrate proficient use of company proprietary systems and imaging system
- Preparations for company events, including ordering of supplies, if needed
- Actively continue to improve personal knowledge and practices of the insurance industry through work experience, in-house instruction, industry courses and workshops

### Secondary Functions:

- Assist accounting with New/Changes/Terminations for agent/broker appointments and terminations
- Prepare Power Point and presentations
- Maintain Marketing Procedure Guide and update as necessary
- Maintain and update the Agency database
- Work with accounting on the bi annual WA appointment process and WA and OR taxes
- Maintain a list of all vendors and keep on top of critical dates when supplies need to be ordered and quantities
- Manage the distribution of gifts to our agents
- Keep track of Marketing shows and sponsored events to make sure we meet deadlines
- Maintain list of all invoices for department
- Gather information from various individuals relating to promotional give-a-ways
- May be required to attend trade shows, agency visits or events during &/or after normal business hours to promote product
- Other duties as assigned

### Job Scope:

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The nature of this position is both routine and varied with a slight degree of complexity. Individual will be expected to evaluate procedures and provide recommendations for improvement as needed. Work is independent with moderate supervision. Individual will be expected to participate with the Marketing VP on the development of the department operational plan. All work must be performed with a high degree of accuracy. Inappropriate actions can result in poor public / agency relations and/or affect the company's level of profit.

**Supervisory Responsibility:**

This position does not have supervisory responsibility

**Interpersonal Contacts:**

This position encounters both internal and external contacts. Internal contacts are within own department and other departments to resolve agency related matters. External contacts will generally be calls made to our agency partners to assist them in writing profitable business with us. These calls will help the agents understand our products, service levels and market conditions. The exchange of information may include some confidential information. Care must be taken to protect the privacy of all customers. Individual must be respectful of others at all times. Individual generally initiates contacts on his/her own with the majority being by email. There is also a fair amount of contact via phone and some face-to-face contact.

**Specific Job Skills:**

- Strong negotiation, problem-solving and research skills
- Organized and able to work independently within defined authority, manage workflow, utilize good judgment, meet deadlines, take initiative to address identified needs and make independent decisions
- Possess effective interpersonal skills
- Must be detail-oriented
- Strong work ethic and a sense of urgency with a high degree of accuracy
- Able to work closely with others
- Ability to work effectively as a team player
- Exceptional communication skills with the ability to present and articulate ideas to a diverse audience
- Ability to read, write and orally communicate in English, clearly and concisely with use of good grammar, spelling, and punctuation.
- Ability to work effectively with Microsoft Word, Excel, Power Point and Outlook
- Must be able to function using automated tools, including company systems, imaging system, e-mail and the Internet
- Basic math skills

Physical abilities would include:

- Lift a minimum of 20 lbs.
- Sit for extended periods of time
- Type minimum of 40 wpm
- Operate a telephone
- Look at a computer monitor for extended periods of time

**Minimum Education and/or Experience:**

- High School diploma or GED required and
- 1 year industry experience preferred
- 3 years work experience that provides the knowledge, skills and abilities
- Preference will be given to candidates with, or currently working on a clear path to completing, insurance designations related to the position

**Job Conditions:**

- Work environment is a business office
- Fair amount of time spent on telephone
- Must be able to use standard office equipment (i.e. copy machine, phone, fax, calculator, etc.)
- Must be able to work over-time as necessitated by demands of the position
- Position includes light travel, including occasional overnight stay out of town

This organization believes that each employee makes a significant contribution to our success. That contribution should not be limited by the assigned responsibilities. Therefore, this position description is designed to outline primary duties, qualifications and job scope, but not limit the individual or the organization to just the work identified. It is our expectation that each employee will offer his/her services wherever and whenever necessary to ensure the success of our endeavors.