

Red Shield Insurance Company

Job Description

Job Title: Marketing Manager
Department: Marketing
Reports To: VP Marketing
Date: March 2021

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

The Marketing Manager will work in conjunction with the Marketing VP to oversee the marketing and agency make up. Individual is responsible for managing the daily business relationship between the company and agents as well as building and maintaining strong agent relationships. Position is responsible for managing the training and education of the marketing staff.

Essential Functions:

- Manage existing customers by acting as a liaison between producers, agents and underwriters and other company personnel
- Communicate to the agency plant all company positions that relate to products, rates, forms and underwriting appetite
- Monitor agency customer satisfaction
- Assists the Marketing VP in developing marketing plans
- Set up and schedule appointments to visit existing and new prospective agents
- Assist in the development of new products and redevelopment of existing products and programs for the companies
- Support and coordinate the development of agency marketing and business plans, monitor results, and recommend constructive and corrective feedback internally and at the agency level
- Distribute approved marketing material to new and prospective agents
- Develop and maintain technical knowledge of all company procedures and products
- Update sales reports monthly, quarterly and annually
- Actively pursue and attend periodic social events for customers
- Monitor and provide feedback, including recommendations, for enhanced agency relationships
- Provide management reports that communicate marketing efforts and results
- Develop and recommend ideas for marketing materials, programs and activities
- Learn and demonstrate proficient use of company proprietary systems and imaging system
- Actively continue to improve personal knowledge and practices of the insurance industry through work experience, in-house instruction, industry courses and workshops

Secondary Functions:

- Attend trade shows and social events promoting the company
- Meet with agents, along with other company staff/management, to enhance company knowledge and agency relationships
- Identify potential new agency prospects
- Monitor agency profit and production results and work with the underwriting departments to improve results
- Monitor competition to determine when rate, form and risk appetite changes
- Relay information regarding potentially available marketing or underwriting candidates
- Other duties as assigned

Job Scope:

Individual establishes and amends marketing procedures and guidelines and other documents as needed. Responsible for on-going planning and goal setting for the marketing department. Position encounters recurring work situations with occasional variations from the norm involving a moderate degree of complexity. Individual must be able to demonstrate the ability to make complex decisions, utilize creativity and work independently. Poor judgment and/or failure to follow company procedures and carry out position duties could have a significant negative impact on the company image and results. Ineffective management of department will have a significant negative impact on morale and will create an adverse financial impact on the company.

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Supervisory Responsibility:

Individual will have direct supervision of 1 - 4 employees which may include marketing reps, coordinators, assistants &/or clerical. Supervision includes monitoring the workflow of the daily functions, attendance, addressing any personnel issues, approving overtime and time off requests, recommending disciplinary action and through the exercise of independent judgment, responsible for directing the workforce. This person will participate in the selection of potential new hires including interviewing and providing recommendations.

Interpersonal Contacts:

Contacts will be with company executives, other employees, and customers outside the organization. Internal contacts are with own department staff, executive management and other department supervisors/managers and staff. External contacts are primarily with producers, but on occasion could be with policyholders, vendors, reinsurers and state insurance departments. Interactions will focus on gathering ideas and information exchange, which will 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 which can be by phone, email or face-to-face.

Job Requirements:

- Extensive marketing knowledge
- Ability to read and write contracts and documents, clearly understanding their meaning and ability to detect and correct lack of clarity
- Provide leadership in a professional manner
- Develop and maintain in-depth knowledge of products. Stay current on events and issues relating to industry and have the ability to move focus from one to another quickly.
- Manage a diverse staff which requires flexibility and patience
- Organized and able to maintain organization
- Effective negotiation and problem-solving skills.
- Clearly communicate including verbal, writing and listening skills with Ownership, Management and other company employees from various departments as well as external parties including insureds, agents, reinsurers, regulators, vendors, and policyholders.

Specific Job Skills:

- Able to work independently, manage workflow, utilize good judgment, meet deadlines, take initiative to address identified needs and make independent decisions
- Must be detail-oriented
- Ability to coach and motivate
- Customer focused; possess a demonstrated awareness of agents' needs, wants and requirements
- Strong work ethic and a sense of urgency with a high degree of accuracy
- Able to work closely with others and direct those assisting the position
- Must **possess** analytical comprehension to provide agent and product understanding
- Ability to read, write and orally communicate in English, clearly and concisely with use of good grammar, spelling, and punctuation.
- Possess a strong knowledge of Microsoft Word, Excel, Power Point, Outlook Access
- Must be able to function using automated tools, including company systems, imaging system and the Internet
- Basic math skills

Physical abilities would include:

- Lift a minimum of 20 lbs.
- Sit for extended periods of time while traveling by car or other modes of transportation
- Look at a computer monitor for extended periods of time
- Spend significant amount of time driving an automobile

Personal Skills:

- Effectively communicate with management and other company employees from various departments as well as external parties including customers, agents, reinsurers, vendors, regulators and policyholders
- Act in a professional manner in all business contacts
- Provide leadership in a professional manner
- Possess effective interpersonal skills including negotiating techniques
- Make timely decisions to effectively solve problems

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Job Conditions:

- Must be able to spend significant blocks of time at a desk using a keyboard and computer monitor
- Must be able to spend significant amount of time on phone
- Must be able to work in a business office
- Must be able to work remotely in an effective manner
- Must have and maintain a current driver's license
- Must be able to work overtime as necessitated by demands of the position
- Must be able to travel on commercial aircraft or by auto and spend multiple days away from home as needed
- Position requires significant amount of travel, 60-80%
- Bondable
- Lack of habits detrimental to performance and reputation

Minimum Education and/or Experience required:

- A Bachelor's Degree in Sales and Marketing, and
- 5 years of professional experience in sales and marketing specific to Commercial Property/Casualty insurance
- An equivalent combination or the above listed requirements will also be considered

The Company believes that the employee makes a significant contribution to the company's success. That contribution should not be limited by the assigned responsibilities. Therefore, this position description is designed to outline primary and secondary duties, qualifications and job scope, and other key issues of the job but such description shall not limit the incumbent nor 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. The person selected to fill the Job described above can and will be flexible about the requirements and be willing to work with management when change is requested.