

## **Job Description –Administrative Assistant (Sales and Marketing Department)**

**Position Title** Administrative Assistant

**FSLA Classification:** Non-Exempt

**Department:** Marketing and Strategic Partnerships

**Reports to:** Director of National Sales and Supervisor of Marketing and Strategic Partnerships

### **Position Summary:**

The Administrative Assistant is responsible for organizing and coordinating all administrative functions for the Director of National Sales. Will assist in updating the contact files, interacting with outside producers and aid in the corporate efforts to research and attract new client prospects. Will handle a multitude of marketing projects and sales goals, coordinate responses to Requests for Proposals (RFP), interact with Account Managers to develop and follow up on current clients. Contributes to the overall efforts of the Marketing and Strategic Partnerships team to help collaborate efforts and increase sales, productivity and efficiency. Must demonstrate a high level of initiative, excellent communication skills and organizational skills. Requires a high level of subject matter expertise in utilizing Microsoft and other software, documentation proficiency skills and research knowhow. Will provide regular updates and recommendations to further assist in the strategic direction and corporate growth as needed. This is a non-commissioned, salaried position; the Administrative Assistant will not be required to participate in sales.

### **Essential Duties and Responsibilities:**

- Interacts with the Director of National Sales to manage and oversee inside administrative duties for the sales and Marketing and Strategic Partnerships departments.
- Prepares, organizes and distributes documentation including client reports, sales and marketing reports, data input and filing electronically.
- Must be able to take direction and easily understand sales functions and requirements.
- Prepares and documents, service agreements, and data sharing agreements. Appropriately saves the executed documents into document management software and updates to the agreements logs.
- Creates marketing presentations, compiles data reports & spreadsheets, composes correspondence, and prepares other documentation with thoroughness and accuracy within the final/end product.
- Coordinates efforts for planning and scheduling meetings, conferences calls, trade shows, conferences and client meetings, and other onsite or offsite appointments.
- Assists in drafting responses and coordinating Requests for Proposal (RFP) documents. Coordinates with management, sales & marketing teams to prepare effective output, and organize written responses within the final presentations.
- Manages the oversight of trade shows and conferences. Makes sure all documentation is prepared and completed, materials are shipped and returned, registrations are handled, and travel arrangements are made for flights, hotels, transportation and other offsite accommodations.
- Prepares monthly newsletter and other routine sales communications.
- Assists the Director of National Sales on a daily basis in coordinating sales prospects, as well as follow-up on all sales functions, and in cultivating strategic business relationships.
- Provides lead research on client and client prospect backgrounds, as well as research on brokers and third party administrators.

- Manages the contact data base that is utilized for client and broker contacts (Base CRM), forwarding newsletters to clients and prospects, and for any communication with other contacts as needed or directed.
- Works with Account Managers in compiling client status reporting, and any relevant updates as needed or required by the Sales Director or management.
- Partners with other department managers and the executive team to ensure documentation and deliverables are meeting overall expectations.
- Ensures data integrity and data accuracy in presentations and reports are valid, measured, and maintained or updated as needed.
- Provides regular input to management and effectively demonstrates that personal work efforts are aligned with the overall corporate and departmental objectives.

#### **Additional Duties and Responsibilities:**

- Ability to quickly learn computer software and features, research and gather a variety of information, then organize into a presentable and easy to follow format.
- Demonstrate the ability and initiative to anticipate the needs of the Director of National Sales for scheduling conferences, following up on contacts and sales prospects.
- Conducts research for driving the corporate efforts to be a visionary leader in the Retiree Drug Subsidy (RDS) marketplace and strengthen our competitive advantage.
- Other duties as assigned or as business needs are changed or expanded.

#### **Skills and Attributes:**

- Excellent Skills with Microsoft Windows 10, Microsoft Excel and PowerPoint, and familiarity with a variety of computer programs and data formats.
- Excellent overall computer literacy, including file organization, finding tools to accomplish routine goals, personal management via Microsoft Outlook, corporate websites, and social media.
- Excellent writing, communication, and interpersonal skills.
- Must demonstrate a strong initiative and a confident personality in order to maintain all necessary functions with the corporate office, and as needed for the offsite sales staff.
- Strong attention to detail. Good analytical, interpretive and critical thinking skills.
- Must be able to learn new technologies, utilize basic office equipment, and effectively function with the various tools and software we use and maintain.
- Ability to regularly use business judgment in applying company policies, processes and procedures.
- Must be very flexible and adaptable as sales priorities shift and current work assignments can and will change on a daily or weekly basis.
- Very good time management and organizational skills with the ability to manage multiple assignments with a variety of timeframes and tight deadlines.
- Ability to work in a team environment, and to participate on project teams as needed.
- Must be able to handle confidential and sensitive information securely and appropriately.
- Ability and passion to learn the business and industry to assist in the development of new products.

#### **Other Experience, Skills and Attributes:**

- Knowledge in other computer software including Adobe Acrobat and the full Adobe Suite.
- Any experience in health care benefits, health care insurance, Pharmacy Benefit Management (PBM), prescription drug administration or medical claims processing is a plus; otherwise a willingness to learn these health care industries and their related terminology.

### **Education and Special Training Requirements:**

- AA required, BA/BS preferred, to be in business or technical, or in a related field.
- Previous experience in administrative or executive assistant support desirable.

### **Competencies:**

- Oral Communication Skills
- Written Communication Skills
- Reading Skills
- Analyzing
- Collaborating/Cooperation
- Computer Literacy
- Customer Relations
- Documenting
- Filing
- Innovation
- Interpreting
- Leadership
- Math Aptitude
- Mentoring
- Organization
- Original thinking
- Planning
- Presentation Skills
- Prioritizing
- Problem Solving
- Professionalism
- Project Management
- Reasoning
- Time Management
- Troubleshooting
- Working under stress

### **Qualifications and Work Experience:**

- One to two years of related experience.
- Experience with Microsoft Office, Word, Excel, and PowerPoint.
- Excellent oral and written communication skills
- Self-starter that is engaged and able establish good interpersonal relationships.
- Ability and passion to learn the business and industry to assist in the development of new products.
- Strong familiarity with general computer systems and the ability to quickly learn custom software.
- Experience in health care insurance, prescription drug administration, or medical claims processing is beneficial.

**Language Ability:**

Ability to read, analyze, interpret general business documents, technical procedures, government regulations and requests for proposals. Ability to write reports, business correspondence and procedure manuals. Ability to effectively present information and respond to questions from groups of clients, prospects, managers and general staff.

**Reasoning Ability:**

Ability to define problems, collect data, establish facts and draw valid conclusions. Ability to interpret an extensive variety of detailed or technical instructions in mathematical or diagram form and deal with several abstract and concrete variables. Ability to question activities and issues in all functional areas and make sound business decisions based on that data.

**Physical Demands:**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing duties the employee is regularly required to sit, use hand and fingers, reach with hands and arms, and to talk and hear. The employee is occasionally required to stand and walk, and occasionally stoop or crouch. Specific vision abilities required by this job include close vision and the ability to adjust focus.

**Work Environment:**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually low-to-moderate.

This job description reflects essential functions and does not prescribe nor restricts the tasks that may be assigned. Employees and workforce members assigned to this position will be required to perform any other job-related duties as assigned by management.