



## JOB DESCRIPTION

### Agency Success Manager

**Department:** Customer Development

**Reports to:** President

#### **General Summary:**

As an Agency Success Manager you will be responsible for developing and leading a high performing sales and customer service team across multiple lines of health benefits business, including Individual/Family, Medicare plan and Group. You will execute strategic growth plans, manage sales and customer service performance, and coach a team of licensed agents and support staff. This role will be at the center of a growing environment, helping shape scalable processes, driving strategic growth, and expansion into new markets. This role requires a strong leader, with deep experience in sales and customer service, a background in healthcare or insurance, and a proven ability to scale teams and revenue.

This is an exempt position and may require hours that exceed a standard 40-hour work week.

#### **Key Responsibilities:**

- **Sales Leadership & Strategy**
  - Develop and execute sales strategies to drive growth across multiple service lines.
  - Set and manage KPIs for the team as a whole and individualized targets for licensed agents.
  - Continuously refine sales tactics based on data and market trends.
  - Lead the efforts to execute on annual renewals and identify cross-sell and upsell opportunities with customers.
  - Build scalable, repeatable sales processes tailored to each line of business.
  - Analyze market trends and competitor activity to identify opportunities.
- **Customer Service**
  - Ensure excellent customer service across all lines of business and follow-through across all stages of the client lifecycle.
  - Set and manage KPIs for customer service metrics and outcomes.
  - Ensure proper phone and email coverage is established each day and monitor effectiveness of scheduling.
- **Team Management & Development**
  - Train, manage and recruit (when needed) a team of licensed insurance agents and customer service-based support staff.
  - Foster a high-performance culture through regular mentoring, coaching, individualized feedback sessions and performance reviews.



- Create and foster a collaborative environment across all disciplines within the team ensure superior customer satisfaction and retention.
- Create and deliver sales training programs and resources.
- **Business Development**
  - Own and grow strategic partnerships and referral networks with local businesses, healthcare providers, and community-based organizations.
  - Represent the agency at networking events, trade shows, and community functions.
  - Leverage digital tools and CRM systems to manage leads and streamline the sales process.
- **Cross Functional Collaboration**
  - Work closely with Customer Engagement, Customer Management, Project Office and leadership to ensure alignment on growth goals and customer experience.

**Qualifications:**

- Proven experience in a sales management or growth-focused role, preferably within the insurance or healthcare industry
- At least 5 years in a managerial role responsible for hire/terminate of team members
- Active health insurance license (or ability to obtain one within a specified time).
- Strong leadership, coaching, and team-building skills
- Sales acumen
- Customer Service acumen
- Strategic thinker who also thrives in tactical execution
- Data-driven and results-oriented, with excellent analytical and problem-solving abilities
- Proficient with CRM systems and sales performance tools
- Excellent communication and interpersonal skills
- Negotiation skills
- Strong relationship builder who enjoys cultivating long-term partnerships
- Proven ability to build culture, motivate teams, and drive results