



Products and people you can rely on

American Association of Insurance Services

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Engagement Manager, Sales and Business Development

Purpose

The Engagement Manager (EM) for all product lines (Personal Lines, Inland Marine, Commercial, Farm & Ag) is the frontline Sales and Business Development partner to Internal and External AAIS Stakeholders. The EM ensures:

- Timely response to new opportunities (email, phone, web)
- The business development pipeline is effectively managed
- Leads, prospects and opportunities are nurtured to fruition
- Proposals for new and existing opportunities are produced, presented, and documented
- Market Intel is captured
- Consultative, proactive sales approach to all opportunities
- Product service level expectations are set
- AAIS staff are engaged in customer service and meeting process expectations
- Metrics on support and growth performance are communicated
- Experience is captured and brought back to the product/service team and the organization as a whole

Responsibilities

1. Provide sales and marketing services around the products and to the market segments for all programs, with front-line engagement with the segment market and individual companies around sales, support, relationship management, research and trends.
2. Provide, ensure and communicate metrics demonstrating exceptional customer service to inquiries, prospects, influencers, partners as well as internal and external customers and stakeholders.
3. Collaborate on the research, development and communication of segment-specific market profiles, personas, journey maps, content strategies and messaging vehicles to target, initiate, nurture, convert and grow awareness and participation with AAIS.
4. Collaborate with and ensure participation of staff in the delivery, tracking and success of engagement services such that everyone involved in that delivery knows the goals, messaging, processes and supports the activities to reach, support and grow our membership.
5. Manage the expectations with segment leaders and the leadership team around growth and performance expectations of the segment, including budgeting (travel, marketing, third-party resources and staff requirements), membership growth/loss, revenue, opportunities/threats, engagement activities and support requirements to start the year, with quarterly formal updates and continual informal updates in the form of dashboards and status updates, and a year-end summary.
6. Collaborate and apply individual expertise to ensure operational and management systems (e.g. Affiliation Management, Salesforce, Pardot, etc.) serve the needs of the Engagement Team, the company and continually improve to be more efficient and better serve the needs of the team, company and our customers.

Requirements

1. Travel expectations will be approximately 25% with potential periods of intense travel (typically Spring/Fall) as required for conferences and opportunity development.
2. Regular meetings with product team leader(s), at least twice per week (daily preferred) to ensure activities are clear, prioritized, managed and delivered to success.
3. Regular meetings with the ME team (at least twice per week) to ensure functional expectations are met – phone coverage, email responses, operational responsibilities (e.g. desktop audits, system responsibilities, etc.) are covered to allow both “heads down” time and interactive time.
4. Regular communication to the Customer Engagement Director.

Skills, Knowledge and Abilities

1. Bachelors degree in Marketing or sales
2. P&C Insurance industry experience a must
3. Proven track record with successful sales experience
4. Ability to develop in depth knowledge about the insurance lines
5. Consultative sales skills with a focus on closing sales
6. Ability to work in a variety of software systems
7. Superior listening skills