State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Senior Marketing Representative

Program:
Regional Operations

Work Unit:
Regional Marketing

Classification:
Senior Workers' Compensation Insurance Representative

Report To:
Manager II, State Fund

Collective Bargaining Identifier (CBID):
R01

Fair Labor Standards Act (FLSA) Status:
Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Program Information:

The Field Marketing Team establishes and maintain key business relationships with broker business partners to support the submission of business opportunities to State Fund, and at the same time, collaborate with regional management and other internal stakeholders on the underwriting and servicing of accounts.

Purpose/Scope:

Under the general supervision of the Manager II, SCIF (Regional Marketing Manager), the Senior Workers' Compensation Insurance Representative (Sr. Marketing Representative) will responsible to develop, educate, manage and strengthen professional business relationships within an assigned brokerage territory in accordance with the Region's strategic plan priorities. Successful execution in this role includes having a proficient understanding of the broker's business model and their dynamics in order to pro-actively develop State Fund's book of business and maximize the brokerage's potential for production and profitability. In fulfilling the above duties you will work independently, have authority to make decisions while demonstrating an understanding of key issues to consult and appraise management. Discretion and tact are critical components of this role.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner
- Follow State Fund's Equal Employment Opportunity principles

- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

40% Essential

1. Book Management/Business Development

a. Effectively manage a territory and book of business in collaboration with the underwriting teams (all segments).
b. Assess and analyze brokerages using available reports and tools like Broker Assessments and Business Plans to identify and prioritize opportunities that support pipeline efforts for new business.
c. Assist Marketing Leadership in the development and execution of strategic regional initiatives in support of Enterprise goals. Understand the components of successful planning to help achieve goals.
d. Plan and conduct strategic brokerage calls to maximize opportunities; keeping principals, producers and account managers up to date of State Fund products and services.
e. Effectively manage touch points to influence mindsets utilizing a combination of physical, virtual, and telephonic connections. This requires strategic planning and effective time management.
f. Build plans that recognize the unique elements and opportunities of each broker in their assigned territory. One which considers, among other things, our relationship and position in their business model, their other markets, their knowledge of State Fund, and their growth potential.
g. Complete, maintain, and upload Broker Assessments, Profiles and other required documents timely to ensure broader and greater understanding of the brokers operations.
h. Develop and follow through on action plans and commitments for brokers in your territory.
i. Investigate Broker Contract Violations and make recommendations to the Regional and Corporate Marketing management teams and Corporate Marketing to facilitate resolution and or consequence.
j. Act as lead for your team in the AMM/RMM's absence and provide training support to peers on industry and regulatory changes.
k. Contribute to projects both within Regional Field Operations and Corporate Marketing and Underwriting units.

30% Essential

2. Relationship Building

a. Establish and maintain positive working relationships by creating regular touch-points with and across all levels of broker organization.
b. Communicate regularly and effectively with manager and other internal team members to maintain positive working relationships.
c. Positively promote State Fund to industry groups and insurance professionals, maintaining membership as appropriate. Plan, coordinate, and participate in broker or industry events, State Fund hosted events, and special projects to enhance State Fund's image in the broker community.
d. Discuss broker performance to collaboratively design strategies for mutual success to increase partnership and confidence.

e. Coordinate and provide quality and timely customer service to brokers, policyholders, workers' compensation community, and all staff within the organization.
f. Apprise other State Fund departments of servicing issues when necessary so they can be addressed and brought to resolution.
g. Effectively engage and influence brokerage's principals and staff as well as internal colleagues and leadership within State Fund.
h. Listen effectively and pivot as necessary to ensure customers' needs are addressed.
i. Negotiate and manage difficult conversations, escalating issues to the management team, as necessary.
j. Support and effectively communicate organizational decisions while maintaining credibility with brokerage principals and their staff. This requires a strong working knowledge of the elements of our rate filing, our underwriting procedures, and the rules and regulations governing our industry.
k. Work collaboratively with underwriting segments and other departments to optimize new business placement and high retention results.
l. Effectively communicate rules and processes to programs outside of Corporate Marketing, such as, but not limited to, Claims, Safety & Health, Premium Audit. This requires broad and extensive organizational knowledge.

30% Essential

3. Presentation

a. Effectively present to a wide range of audiences regardless of size and levels of authority / influence.
b. Ensure that State Fund's key messages and Value Propositions are included in education and presentation materials.
c. Provide training and education to external stakeholders on State Fund's products and services as well as on regulatory changes.
d. Tailor communication/messaging based on structure of the brokers individual business model, focus, and organization.
e. Utilize business acumen to effectively articulate workers' compensation insurance products/programs, comparing and contrasting to highlight the State Fund advantage.
Understand State Fund and our important role in the marketplace.

100%

Required Knowledge Areas:

- Proficient knowledge of State Fund underwriting and marketing advisories, policies, and procedures.
- Working knowledge of State Fund standard software applications.
- Proficient knowledge of various State Fund functions as they affect underwriting, marketing, claims.
- Proficient knowledge of State Fund Underwriting and Billing & Collections policies and procedures.
- Proficient knowledge of the State Fund organization, Regional Office and Corporate functions, and business policies and practices.
- Proficient knowledge of workers' compensation insurance rules and regulations.

Required Skills and Abilities:

- Ability to research, analyze, and evaluate information to make and support decisions.

- Ability to achieve results according to objectives.
- Ability to coordinate, facilitate, and make presentations.
- Ability to handle high pressure situations while being firm but tactful.
- Ability to analyze issues, interpret and apply laws/regulations and policies and procedures to proactively make and support decisions.
- Ability to manage multiple projects and tasks.
- Ability to work independently and as a team with co-workers and management to address and resolve issues.
- Ability to resolve sensitive issues and problems.
- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".
- Ability to analyze issues, interpret and apply laws/regulations and policies and procedures to proactively make and support decisions.
- Ability to provide and promote professional public relations.
- Ability to influence others and negotiate agreements and consensus among project partners, work peers, and other stakeholders.
- Ability to effectively work and relate with other people.
- Ability to prioritize and develop relationship management and producer activities to build trust, facilitate negotiation, and secure commitment in order to achieve desired goals and outcomes.
- Ability to identify, analyze and solve problems as well as the ability to learn rapidly, adapt quickly to change, exercise influence, and manage and prioritize multiple concurrent projects.
- Ability to identify, delegate and escalate (as needed) service issues while working with brokerages and internal colleagues to address customer service concerns. Follow-up on critical outstanding issues to ensure concerns are properly resolved and communicated.

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- Remaining stationary and moving for prolonged periods of time.
- Move/remain in a stationary position for up to 2 hours at a time.
- Occasional movement of items up to 15 lbs.

Travel:

- Frequent business travel.
- Travel conditions may include urban and/or rural areas and could involve traversing uneven surfaces or ascending stairs.
- Travel to various work sites and locations for training and/or meetings.
- Travel on a regular basis is required within assigned region. Occasional travel required for function wide trainings, meetings and network events.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.
- Will occasionally involve work in the evenings.

Supervisor's Statement: **I have discussed the duties of the position with the employee**

Supervisor Name (Print):	Supervisor Signature:	Date:

Employee's Statement: **I have discussed with my supervisor the duties of the position and have received a copy**

Employee Name (Print):	Employee Signature:	Date:

State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Marketing Representative

Program:
Regional Operations

Work Unit:
Regional Marketing

Classification:
Workers' Compensation Insurance Representative (9327)

Report To:
Manager II, SCIF

Collective Bargaining Identifier (CBID):
R01

Fair Labor Standards Act (FLSA) Status:
Covered, Work Week Group 2

Special Requirements

Conflict of Interest Designation: Not applicable.

Bilingual Position: Not applicable.

Rotational Assignment: Not applicable.

Program Information:

The Field Marketing Team establishes and maintain key business relationships with broker business partners to support the submission of business opportunities to State Fund, and at the same time, collaborate with regional management and other internal stakeholders on the underwriting and servicing of accounts.

Purpose/Scope:

Under the direction of the Manager II, SCIF (Regional Marketing Manager), the Workers' Compensation Insurance Representative (Marketing Representative) will responsible to develop, educate, manage and strengthen professional business relationships within an assigned brokerage territory in accordance with the Region's strategic plan priorities. Successful execution in this role includes having an understanding the broker's business model and their dynamics in order to pro-actively develop State Fund's book of business and maximize the brokerage's potential for production and profitability. In fulfilling the above duties you will work independently, have defined authority levels, and will be expected to prepared and support decisions for your manager manger's review, while demonstrating an understanding of key issues to successfully perform the work. Discretion and tact are critical components of this role.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct

- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

40% Essential

1. **Book Management/Business Development. Decision-making authority will require greater supervisory review and approvals.**
    a. Under appropriate supervision (training, direction, and feedback) prepare and support decisions, presentations, assessments and action plans for an assigned book of business then obtain approval from your manager prior to execution.
    b. Effectively manage a territory and book of business in collaboration with the underwriting teams (all segments) at a level of assignment appropriate for learning and developing competencies.
    c. Assess and analyze brokerages using available reports and tools like Broker Assessments and Business Plans to identify and prioritize opportunities that support pipeline efforts for new business under guidance appropriate for the WCIR level.
    d. Assist Marketing Leadership in the execution of strategic regional initiatives in support of Enterprise goals, utilizing this assignment to develop proficiency for performance at the Sr WCIR level. Understand the components of successful planning to help achieve goals.
    e. Plan and conduct strategic brokerage calls to maximize opportunities, with appropriate direction, keeping principals, producers and account managers up to date of State Fund products and services.
    f. Effectively manage touch points to influence mindsets utilizing a combination of physical, virtual, and telephonic connections within established performance expectations. This requires strategic planning and effective time management.
    g. Build plans that recognize the unique elements and opportunities of each broker in their assigned territory to develop required proficiency. One which considers, among other things, our relationship and position in their business model, their other markets, their knowledge of State Fund, and their growth potential.
    h. Complete, maintain, and upload Broker Assessments, Profiles and other required documents timely to ensure broader and greater understanding of the brokers operations
    i. Develop and follow through on action plans and commitments for brokers in your territory with regular feedback from management.
    j. Investigate Broker Contract Violations and make recommendations to the Regional and Corporate Marketing management teams and Corporate Marketing to facilitate resolution and or consequence, utilizing decision-making authorities appropriate for this level.
    k. Contribute to projects both within Regional Field Operations and Corporate Marketing and Underwriting units as part of the development toward the Sr WCIR level.

30% Essential

2. **Relationship Building. Receive guidance/assistance from your manager in developing proactive client strategies, managing broker issues, and collaborating with Underwriting and other stakeholders.**
    a. Establish and maintain positive working relationships by creating regular touch-points with and across all levels of broker organization under appropriate supervision (training, direction, and feedback).

b. Communicate regularly and effectively with manager and other internal team members to maintain positive working relationships and receive ongoing direction and feedback.
c. Positively promote State Fund to industry groups and insurance professionals, maintaining membership as appropriate. Plan, coordinate, and participate in broker or industry events, State Fund hosted events, and special projects to enhance State Fund's image in the broker community at a level of assignment appropriate for learning and development.
d. Discuss broker performance to collaboratively design strategies for mutual success to increase partnership and confidence.
e. Coordinate and provide quality and timely customer service to brokers, policyholders, workers' compensation community, and all staff within the organization.
f. Identify and apprise other State Fund departments of servicing issues when necessary so they can be addressed and brought to resolution.
g. Effectively engage and influence brokerage's principals and staff as well as internal colleagues and leadership within State Fund.
h. Listen effectively and pivot as necessary to ensure customers' needs are addressed
i. Negotiate and manage difficult conversations, escalating issues to the management team as necessary, as part of development toward the Sr WCIR level.
j. Support and effectively communicate organizational decisions while maintaining credibility with brokerage principals and their staff. This requires a strong working knowledge of the elements of our rate filing, our underwriting procedures, and the rules and regulations governing our industry.
k. Work collaboratively with underwriting segments and other departments to optimize new business placement and high retention results
l. Effectively communicate rules and processes to programs outside of Corporate marketing, such as, but not limited to, Claims, Safety & Health, Premium Audit. This requires broad and extensive organizational knowledge.

30% Essential

3. Presentation.

a. Establish and maintain positive working relationships by creating regular touch-points with and across all levels of broker organization under appropriate supervision (training, direction, and feedback).
b. Communicate regularly and effectively with manager and other internal team members to maintain positive working relationships and receive ongoing direction and feedback.
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- Working knowledge of the State Fund organization, Regional Office and Corporate functions, and business policies and practices.
- Working knowledge of workers' compensation insurance rules and regulations.

Required Skills and Abilities:

- Ability to research, analyze, and evaluate information to make and support decisions.
- Ability to achieve results according to objectives.
- Ability to coordinate, facilitate, and make presentations.
- Ability to handle high pressure situations while being firm but tactful.
- Ability to manage multiple projects and tasks.
- Ability to provide and promote professional public relations.
- Ability to influence others and negotiate agreements and consensus among project partners, work peers, and other stakeholders.
- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".
- Ability to effectively work with and relate with other people.
- Ability to work independently and as a team with co-workers and management to address and resolve issues.
- Ability to resolve sensitive issues and problems.
- Ability to prioritize and develop effective relationship management and producer activities to build trust, facilitate negotiation, and secure commitment in order to achieve desired goals and outcomes.
- Ability to communicate (written and verbal) and interact with all levels of external and/or internal business partners within scope of responsibility, team and/or matrix environment.
- Ability to identify, analyze and solve problems as well as the ability to learn rapidly, adapt quickly to change, exercise influence, and manage and prioritize multiple concurrent projects.
- Ability to identify, delegate and escalate (as needed) service issues while working with brokerages and internal colleagues to address customer service concerns. Follow-up on critical outstanding issues to ensure concerns are properly resolved and communicated.

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- Remaining stationary and moving for prolonged periods of time.
- Occasional movement of items, positioning self at various heights, ascending, and transporting equipment
- Move/remain in a stationary position for up to 2 hours at a time.

Travel:

- Frequent business travel.
- Travel conditions may include urban and/or rural areas and could involve traversing uneven surfaces or ascending stairs.
- Travel to various work sites and locations for training and/or meetings.
- For specified Field positions with no assigned office space): Telework from home or use assigned hoteling space.
- Travel on a regular basis is required within assigned Region. Occasional travel required for function wide trainings, meetings and networking events.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.
- Will occasionally involve work in the evenings.

Supervisor's Statement: **I have discussed the duties of the position with the employee**

Supervisor Name (Print):	Supervisor Signature:	Date:

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