



## MEDICARE SALES AGENT

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**Position Status:** Exempt  
**Reports To:** Medicare Sales Director  
**Effective Date:** 04/02/25  
**Revised Date:**  
**Job Level:** P3

### POSITION SUMMARY

Under direction, this position:

1. Increases membership in the Alliance Medicare D-SNP program through direct sales and marketing of Alliance Medicare products to dual eligible, Medicare/Medi-Cal recipients within assigned service area
2. Develops a sales network to generate leads and provide opportunities for outreach
3. Supports Medicare Sales Department activities and programs
4. Performs other duties as assigned

### RESPONSIBILITIES

1. Increases membership in the Alliance Medicare D-SNP program through direct sales and marketing of Alliance Medicare products to dual eligible, Medicare/Medi-Cal recipients within assigned service area, with duties including but not limited to:
  - Developing sales leads and qualifying leads and prospects in order to create new sales opportunities
  - Identifying current Alliance members that are dual eligible for Medi-Cal and Medicare and facilitating their movement to a managed care environment
  - Generating leads through referrals and local research and prospecting
  - Developing sales strategies to procure sufficient referrals and other self-generated leads in order to meet sales targets
  - Conducting outreach via phone, email, and in person
  - Conducting outbound sales calls to current Alliance members to present the benefits of a total care D-SNP plan
  - Conducting field appointments, educating potential members, and making presentations regarding the benefits of the Alliance D-SNP plan
  - Scheduling and conducting individual meetings and group presentations
  - Utilizing standardized presentation materials to conduct both informal and formal sales presentations and educational presentations
  - Conducting a needs-based analysis to understand potential members' insurance needs and recommend the best product to meet their unique needs
  - Communicating product features and differences, and ensuring that product choices, the enrollment process, and the member service contacts and process are understood
  - Directing prospective enrollees not yet enrolled in Medi-Cal to the appropriate county agency
  - Assisting individuals with completion of the enrollment application
  - Maintaining knowledge of current Medicare, Medi-Cal, and Alliance benefits
  - Following all regulatory guidelines and adhering to sales and marketing requirements established by the Centers for Medicare & Medicaid Services (CMS)

- Adhering to HIPAA regulations
  - Following ethical sales practices and adhering to established policies and procedures
  - Responding to inbound calls distributed through a call queue system
2. Develops a sales network to generate leads and provide opportunities for outreach, with duties including but not limited to:
    - Building community relationships, conducting outreach, and making presentations to community-based organizations, provider offices, and the general public to provide information and education regarding Alliance D-SNP benefits
    - Initiating opportunities for sales presentations, group meetings, community events, and other senior activities within the assigned service area
    - Participating in targeted community outreach to group associations, community centers, senior residences, and other potential marketing sites
    - Establishing effective and productive relationships with providers and community leaders within the assigned service area in order to identify and develop new sales opportunities that support member growth objectives
    - Developing sales resources and creating a network of opportunities and contacts
    - Participating in events organized by Community Engagement Department staff and making recommendations for additional opportunities for member engagement
    - Working closely with Alliance providers to identify and educate potential members and participating in provider promotional activities
    - Receiving sales referrals from Member Services staff and referring members with questions related to current coverage to Member Services, as appropriate
    - Staying informed of changes to provider networks in assigned service area
  3. Supports Medicare Sales Department activities and programs, with duties including but not limited to:
    - Tracking marketing and sales activities, leads, and referrals, and maintaining and regularly updating sales prospects in the lead management system
    - Working with the Medicare Enrollment Specialist to resolve application and enrollment issues
    - Notifying the Medicare Sales Director and the Compliance Department of any suspected fraud, waste, or abuse or non-compliance with CMS regulations or Alliance policies
    - Staying informed about industry trends, new products, and best practices
    - Providing input on program and marketing materials
    - Assisting with the development of Medicare Sales Department policies and procedures
  4. Performs other duties as assigned

## EDUCATION AND EXPERIENCE

- Possession within three months of hire and continued maintenance of a license to sell Accident and Health or Sickness insurance issued by the State of California Department of Insurance
- Possession within three months of hire and continued maintenance of current AHIP certification
- Bachelor's degree in Business, Marketing, Healthcare Administration or a related field and a minimum of five years of experience in insurance sales, pharmaceutical sales, medical equipment sales, or a related area (an additional four years of experience may substitute for

the Bachelor's degree); or an equivalent combination of education and experience may be qualifying

#### KNOWLEDGE, SKILLS, AND ABILITIES

- Thorough knowledge of the principles and practices of sales techniques utilized in a highly regulated industry
- Thorough knowledge of the principles and practices of customer service
- Working knowledge of and proficiency with Windows based PC systems and Microsoft Word, Outlook, and PowerPoint
- Ability to quickly develop an in-depth knowledge of all Alliance Medicare and Medi-Cal products and provider networks within assigned service area
- Ability to accurately identify and qualify prospective members
- Ability to assess individuals' insurance needs and recommend appropriate coverage
- Ability to execute defined sales strategies and achieve program goals and objectives
- Ability to consistently achieve or exceed sales targets
- Ability to analyze, interpret, and apply legal and contractual language
- Ability to identify, discuss, evaluate and resolve complex and unusual issues in a timely manner
- Ability to understand and adhere to the laws and regulations that govern the insurance industry
- Ability to conduct sales activities in compliance with sales and marketing requirements established by CMS
- Ability to manage multiple projects simultaneously, prioritize and organize work, and achieve goals and timelines
- Ability to make presentations, effectively address diverse audiences, and adjust communication style to facilitate collaboration and understanding
- Ability to prepare written and oral reports, correspondence and other program documents
- Ability to assist with the development of policies and procedures
- Ability to maintain organized and accurate records
- Ability to quickly adjust communication in response to feedback from potential members
- Ability to explain complex programs, processes, and regulations related to area of responsibility
- Ability to demonstrate a collaborative communication style, build rapport, influence others, negotiate and persuade others, and effectively manage internal and external business relationships
- Ability to work independently with minimal supervision and as a member of a team
- Willingness to renew AHIP certification on an annual basis

#### DESIRABLE QUALIFICATIONS

- Bilingual (English/Spanish)
- Possession of a current license to sell Accident and Health or Sickness insurance issued by the State of California Department of Insurance
- Possession of current AHIP certification
- Working knowledge of the principles and practices of D-SNP sales and/or sales of multiple Medicare products
- Working knowledge of CMS regulations related to Medicare sales

- Working knowledge of the Medicare program and related regulations
- Working knowledge of the Medi-Cal and/or Medicaid Program and related regulations
- Working knowledge of the functions of CRMs
- Familiarity with the healthcare environments and provider networks in the Alliance service area counties

## WORK ENVIRONMENT

- Ability to sit in front of and operate a video display terminal for extended periods of time
- Ability to bend, lift and carry objects of varying size weighing up to 10 pounds
- Ability to work effectively in a remote work environment
- Ability to travel to different locations in the course of work
- Possession and ongoing maintenance of a valid Driver's License, transportation, and automobile liability insurance in limits acceptable to the Alliance

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*This position description, and all content, is representative only and not exhaustive of the tasks that an employee may be required to perform. Employees are additionally held responsible to the Employee Handbook, the Alliance Standard Knowledge, Skills and Abilities and the Alliance Code of Conduct. The Alliance reserves the right to revise this position description at any time.*