



## MEDICARE SALES DIRECTOR

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**Position Status:** Exempt  
**Reports To:** Medicare Program Executive Director  
**Effective Date:** 09/26/24  
**Revised Date:**  
**Job Level:** M3

### POSITION SUMMARY

Under policy direction, this position:

1. Provides strategic management oversight in developing, implementing, directing, and monitoring the Alliance's Medicare Sales Department, including sales strategy development
2. Directs the Medicare Sales Department, acts as a subject matter expert, and provides executive level advice and guidance on Medicare sales strategy and overall business operations
3. Promotes both internal and external collaboration in support of the Medicare strategic sales objectives
4. Directs, manages, and supervises Medicare Sales staff
5. Performs other duties as assigned

### RESPONSIBILITIES

1. Provides strategic management oversight in developing, implementing, directing, and monitoring the Alliance's Medicare Sales Department, including sales strategy development, with duties including but not limited to:
  - Developing strategies and tactical plans related to member acquisition and continuous improvement of the consumer experience while ensuring compliance with Centers for Medicare and Medicaid Services (CMS) guidelines related to Medicare sales and marketing activities
  - Consulting with the Compliance Department to ensure that Medicare Sales activities comply with relevant regulations issued by regulatory agencies, including CMS, Department of Managed Health Care (DMHC), and Department of Health Care Services (DHCS)
  - Identifying strategies and tactics to establish and increase market share that is competitive and sustainable
  - Overseeing day-to-day sales operations, including lead generation, tracking sales performance, and reporting on progress
  - Collaborating with the Marketing and Communications Department to develop and implement the Medicare marketing program, including targeted marketing campaigns and marketing tools
  - Understanding the needs of current and prospective members through market research and analysis
  - Developing incentives to attract and retain members and ensuring products offered enhance the lives of Alliance Medicare D-SNP members
  - Staying informed of local Medicare market conditions and competition, as well as national Medicare trends
  - Providing creative solutions to increase sales while following CMS guidelines
  - Building a member- and community-centric sales team that achieves sales and growth goals

- Deploying internal and external sales agents and/or brokers to provide information about the Alliance Medicare product(s) and create sales leads
  - Identifying and participating in earned media opportunities and community events to market the Medicare Program in collaboration with the Marketing and Communications Department
  - Recommending sales targets and projections for each Alliance service area county in collaboration with other Alliance departments
  - Identifying opportunities for collaboration with community stakeholders that are compliant with CMS marketing guidelines
  - Identifying current Alliance members that are dual eligible for Medi-Cal and Medicare and facilitating their movement to a managed care environment
  - Ensuring that newly acquired members are participants in the D-SNP program
  - Communicating with CMS regarding operational issues and interpretation of CMS guidelines
  - Monitoring sales activities to ensure compliance with CMS regulations and escalating any issues related to compliance to the Medicare Program Executive Director and Compliance Department
2. Directs the Medicare Sales Department, acts as a subject matter expert, and provides executive level advice and guidance on Medicare sales strategy and overall business operations, with duties including but not limited to:
- Participating in the general administration of the Alliance as a member of the executive management team by providing input into the problem-solving and decision-making process
  - Participating in strategic planning and implementation of the Medicare Department sales goals related to the growth and development of Alliance business operations
  - Ensuring that Medicare sales goals and activities are in alignment with the Alliance strategic plan
  - Coordinating and conducting complex research and analysis related to Medicare sales strategies, such as quality, risk stratification, member engagement, benefit design, and provider network
  - Assisting in formulating strategic plans and goal setting in support of Alliance programs
  - Modeling and promoting effective interdepartmental communication
  - Preparing narrative and statistical reports and making presentations
  - Preparing reports for the Board of Commissioners package for review by the Medicare Program Executive Director
  - Developing performance measures related to strategic goals and new projects and presenting to staff and the Board of Commissioners, as directed by the Medicare Program Executive Director
  - Drafting, recommending, and implementing administrative policies, processes and procedures related to Medicare Sales operations
  - Reviewing and assessing overall department functions, core work, goals, and structure, developing and implementing short- and long-term planning to achieve strategic objectives, and completing an annual department assessment
  - Maintaining current knowledge of relevant federal and state laws, policies and directives, and organizational policies and procedures
  - Monitoring legislative and legal changes related to Alliance functions and ensuring appropriate communication of same
  - Overseeing the preparation and maintenance of records, reports and related documents
  - Developing and managing Medicare Sales operations, work plans, and budget

- Attending and participating in internal and external meetings related to Alliance business operations
  - Providing support to the Medicare Program Executive Director and acting for the Executive Director in the Executive Director's absence
3. Promotes both internal and external collaboration in support of the Medicare strategic sales objectives, with duties including but not limited to:
- Ensuring that Alliance staff is informed about the Medicare Sales function including how the organization can support the Medicare Sales Department
  - Conducting training of internal staff and/or brokers on the Medicare Program and related CMS regulations, including developing training materials
  - Working with the Provider Services Department to ensure that contracted providers are aware of the Alliance's Medicare Program and how enrollment in the program benefits Alliance members
  - Building and maintaining relationships with government agencies, health care providers, community agencies, external business partners, and the community served
  - Making presentations to and interacting with providers, provider groups, hospital systems, and regulators regarding Alliance Medicare D-SNP to support recruitment
4. Directs, manages, and supervises Medicare Sales staff, with duties including but not limited to:
- Functioning through subordinate Unit Managers, as applicable, exercises full supervision of costs, methods, and staffing
  - Participating in the hiring, selection, and salary administration of Medicare Sales employees
  - Ensuring that Medicare Sales staff maintains up-to-date knowledge, skills and abilities related to the administration of assigned responsibilities and functions
  - Identifying, overseeing, and assisting with objectives, priorities, assignments, and tasks, and reviewing work products as needed
  - Providing mentoring, coaching, and development and growth opportunities for staff and subordinate managers and supervisors
  - Evaluating employee performance, providing feedback to staff, and counseling or disciplining staff when performance issues arise
  - Overseeing staff in multiple office locations and/or telecommute settings
5. Performs other duties as assigned

## EDUCATION AND EXPERIENCE

- Possession and continued maintenance of a license to sell Accident and Health or Sickness insurance issued by the State of California Department of Insurance
- Possession and continued maintenance of current AHIP certification
- Bachelor's degree in Business, Healthcare Administration, Public Policy, or a related field and a minimum of ten years of experience in a managed care, non-profit, or business development environment, a minimum of six years of Medicare sales experience, four years of which was at the supervisory or management level, and some experience working with Medi-Cal/Medicaid (a Master's degree may substitute for two years of experience); or an equivalent combination of education and experience may be qualifying.

## KNOWLEDGE, SKILLS, AND ABILITIES

- Thorough knowledge of the Medicare program and related regulations
- Thorough knowledge of CMS regulations related to Medicare sales
- Thorough knowledge of the principles and practices of insurance sales
- Thorough knowledge of the principles and practices of D-SNP sales and/or sales of multiple Medicare products
- Thorough knowledge of the principles and practices of sales strategy development and execution
- Working knowledge of the principles and practices of product development and marketing
- Working knowledge of the principles and practices of program development, implementation, management, and evaluation
- Working knowledge of the Medicaid and/or Medi-Cal Program and related regulations
- Working knowledge of and proficiency in promoting and applying change management principles
- Working knowledge of research, analysis, and reporting methods
- Working knowledge of the principles and practices of project management
- Working knowledge of the principles and practices of supervision and training
- Working knowledge of the principles and practices of customer service
- Working knowledge of and proficiency with Windows based PC systems and Microsoft Word, Excel (including pivot tables), Outlook, PowerPoint
- Some knowledge of State and Federal legislative processes
- Some knowledge of the healthcare regulatory process
- Ability to quickly adjust communication in response to feedback from stakeholders
- Ability to consistently achieve or exceed sales goals
- Ability to develop KPIs and metrics related to marketing to analyze campaign performance
- Ability to develop, plan, organize and direct programs and activities that are complex in nature and regional in scope
- Ability to work effectively with cross-functional teams and build strong relationships with stakeholders
- Ability to direct, manage, supervise, mentor, train and evaluate the work of staff
- Ability to provide leadership, facilitate meetings, and partner with and guide staff in the resolution of issues that are complex and may have considerable impact
- Ability to act as a technical resource and explain complex laws, regulations, processes, and programs related to areas of responsibility
- Ability to demonstrate strong analytical skills, accurately collect, manage and analyze data, identify issues, offer recommendations and potential consequences, and mitigate risk
- Ability to identify, discuss, evaluate and resolve complex and unusual problems in a timely manner
- Ability to manage multiple projects simultaneously, organize work, and achieve goals and timelines
- Ability to review and assess overall department function, core work, goals and structure, develop and implement short- and long-term planning to achieve strategic plans, and complete an annual department assessment
- Ability to foster effective working relationships, influence others, negotiate and persuade others, and build consensus with individuals at all levels in the organization

- Ability to demonstrate a collaborative management style, build rapport, and effectively manage internal and external business relationships
- Ability to manage and evaluate the work of contracted brokers, vendors, and consultants
- Ability to influence and motivate team members and peers to achieve program goals and objectives
- Ability to make presentations and adjust communication style to facilitate collaboration and understanding
- Ability to prepare written and oral reports, correspondence and other program documents
- Ability to develop and monitor department, program, and project budgets
- Ability to develop recordkeeping systems and maintain organized and accurate records
- Ability to identify new processes and systems to improve productivity and results
- Ability to oversee the development and implementation of programs, projects, systems, policies, and procedures
- Ability to analyze and interpret legal and contractual language
- Willingness to renew AHIP certification on an annual basis

### DESIRABLE QUALIFICATIONS

- Master's degree in Business, Healthcare Administration, Public Policy, or a related field
- Experience performing Medicare sales and business development in non-profit health plans and organizations
- 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.*