

Position Description: Regional Office Manager (ROM), Walnut Creek, CA

Salary: \$70,000 to \$80,000 with an additional \$16k-\$20k bonus

Company Information

Our client is a 100-year old leading insurance carrier specializing in innovative and flexible employee benefits solutions including disability income and group term life insurance, a suite of voluntary (employee paid) coverage options and fully integrated absence management. They market these solutions through independent brokers and agents to employers of all sizes. They are Rated A (Excellent) by A.M. Best*

Your Role within the Company

- Oversee and manage the sales support and service staff. This position is located in the Northern California Regional Sales Office (Walnut Creek). You will report to a Regional Service Director, with a dotted-line reporting relationship to the Regional Sales Manager.
- Assist in the development of coordinated best practices and effective workflows within the Regional Sales Office, including (but not limited to) all areas of client service delivery, sales support and general office administration. The ROM will also function as a liaison and advocate on behalf of their office to various home office departments as well as to the sales operations area.
- Contribute and participate in various initiatives and projects, in accordance with corporate goals and objectives.
- You will directly supervise the following positions: Account Managers, Client Service Representative, Submissions & Service Coordinator and New Business Sales Support Assistant. There are 9 staff members.
- Prepare annual performance evaluations and development plans.
- Hire, discipline and participate in employee terminations. Communicate and provide accurate job descriptions as well as career path footprints for designated Regional Sales Office's sales support and service personnel.
- Adhere to best practice management standards, as determined by Service Operations leadership (i.e., core processes/workflows, staff meetings structure, performance review standards, etc.)
- Manage all in force and renewal activities to ensure timely resolution of service issues, delivery of renewal data, etc. the overall Regional Sales Office sales, service and support workflow, servicing of the in-force block and improving customer satisfaction and retention

Background Profile;

- Knowledge of and experience with group disability insurance a big plus.
- Relevant supervisory experience, including superior influencing skills at all levels of staff and management
- PC proficiency, including MS Office Suite products as well as the ability to become proficient on required internal system applications on a timely basis.

Company Employee Benefits

- A full scope of employee benefits including health, life, and long term disability insurance, 401k, paid time off