

***DRAFT***

# **MARKETING REPRESENTATIVE JOB COMPETENCY MODEL**



**Developed by Workitect, Inc.  
For \_\_\_\_\_ Corporation**

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**A. OVERVIEW OF THE COMPETENCIES BY CLUSTER**

I. Communication and Influence	II. Task Management	III. Self Management
<p><b>1. Interpersonal Awareness:</b> The ability to notice, interpret, and anticipate others' concerns and feelings, and to communicate this awareness empathetically to others.</p> <p><b>2. Influencing Others:</b> The ability to gain others' support for ideas, proposals, projects, and solutions, through logical argument, appeal to others' interests, and a variety of other indirect strategies.</p> <p><b>3. Building Collaborative Relationships:</b> The ability to develop, maintain, and strengthen partnerships with others inside or outside of the organization who can provide information, assistance and support.</p> <p><b>4. Persuasive Communications:</b> The ability to plan and deliver oral and written communications that are impactful and persuasive with their intended audiences.</p> <p><b>5. Cultural Sensitivity:</b> Working effectively with all races, nationalities, cultures, disabilities, ages and sexes. Demonstrating equal and fair treatment for all.</p>	<p><b>6. Results Orientation:</b> The tendency to keep the desired end result of one's own and one's unit's work clearly in mind, by setting goals and focusing on them tenaciously until they are achieved.</p> <p><b>7. Service Orientation:</b> Demonstrated concern for satisfying one's customers/members and internal customers.</p> <p><b>8. Initiative:</b> Identifying what needs to be done and doing it before being asked to or required by the situation.</p> <p><b>9. Thoroughness:</b> Ensuring that one's own work and information are complete and accurate; careful preparation for meetings and presentations; following up with others to ensure that agreements and commitments have been fulfilled.</p>	<p><b>10. Self Confidence:</b> Belief in one's ability to be successful and willingness to be assertive, challenge others, or raise questions in the face of potential opposition.</p> <p><b>11. Personal Credibility:</b> Demonstrated concern that one be perceived as responsible, reliable, and trustworthy.</p> <p><b>12. Flexibility:</b> Openness to different and new ways of doing things, and to new organizational procedures, and technology.</p>

## **B. MARKETING REPRESENTATIVE COMPETENCIES**

### **I. Communication and Influence Cluster**

#### **1. Interpersonal Awareness**

Definition: The ability to notice, interpret, and anticipate others' concerns and feelings, and to communicate this awareness empathetically to others.

- a) Understands the interests and important concerns of others
- b) Notices and accurately interprets what others are feeling, based on their choice of words, tone of voice, expressions, and other nonverbal behavior
- c) Demonstrates compassion; genuinely cares about people
- d) Anticipates how others will react to a situation
- e) Listens attentively to people's ideas and concerns
- f) Says or does things to address others' concerns; is available and ready to help
- g) Finds non-threatening ways to approach others about sensitive issues
- h) Makes others feel comfortable by responding in ways that convey interest in what they have to say

#### **2. Influencing Others**

Definition: The ability to gain others' support for ideas, proposals, projects, and solutions.

- a) Presents arguments that address other's most important concerns and issues and looks for win-win solutions
- b) Involves others in a process or decision, to ensure their support
- c) Offers trade-offs or exchanges, to gain commitment
- d) Identifies and proposes solutions that benefit all parties involved in a situation
- e) Enlists experts or third parties to influence others
- f) Develops other indirect strategies to influence others
- g) Knows when to escalate critical issues to own or other's management, if own efforts to enlist support have not succeeded

- h) Structures situations (e.g., the setting, persons present, sequence of events) to create a desired impact and to maximize the chances of a favorable outcome
- i) Works to make a particular impression on others; wears professional business attire
- j) Identifies and targets influence efforts at the real decision makers and those who can influence them
- k) Seeks out and builds relationships with others who can provide information, intelligence, career support, potential business, and other forms of help
- l) Takes a personal interest in others (e.g., by asking about their concerns, interests, family, friends, hobbies), to develop relationships
- m) Accurately anticipates the implications of events or decisions within the community and in the organization, and plans strategy accordingly

### **3. Building Collaborative Relationships**

Definition: The ability to develop, maintain, and strengthen partnerships with others inside or outside of the organization who can provide information, assistance and support.

- a) Ask about the other person's personal experiences, interests, and family
- b) Ask questions to identify shared interest, experiences or other common ground
- c) Shows an interest in what others have to say; acknowledge their perspectives and ideas
- d) Recognizes the business concerns and perspective of others
- e) Expresses gratitude and appreciation to others who have provided information, assistance or support
- f) Takes time to get to know co-workers, to build rapport and establish a common bond
- g) Tries to build relationships with people whose assistance, cooperation and support may be needed
- h) Provides assistance, information and support to others, to build a basis for future reciprocity

### **4. Persuasive Communication**

Definition: The ability to plan and deliver oral and written communications that are impactful and persuasive with their intended audiences.

- a) Identifies and presents information or data that will have a strong effect on others
- b) Selects language and examples tailored to the level and experience of the audience
- c) Uses language of members and potential members
- d) Selects stories, analogies, or examples to illustrate a point
- e) Creates brochures, flyers, newsletters, posters, graphics, overheads, or slides that display information clearly and with high impact
- f) Presents several different arguments in support of a position
- g) Ensures that information is passed on to others who should be kept informed
- h) Expresses oneself clearly in conversations and interactions with others, and in business writing

## **5. Cultural Sensitivity**

Definition: Working effectively with all races, nationalities, cultures, disabilities, ages and sexes. Demonstrating equal and fair treatment for all.

- a) Proactively seeks information from others who have different personalities, backgrounds, and styles. Includes them in decision-making and problem solving
- b) Communicates and cooperates with others who have a diversity of cultural and demographic backgrounds.
- c) Makes it easy for others to feel valuable regardless of diversity in personality, culture, or background.
- d) Includes in conversations people with diverse cultural backgrounds, and invites them to be part of informal work-related activities, such as going to lunch or attending company social events.
- e) Helps recruit and orient employees with a diversity of cultural and demographic backgrounds.

## **II. Task Management**

### **6. Results Orientation**

Definition: The tendency to keep the desired end result of one's own or one's unit's work clearly in mind, by setting goals and focusing on them tenaciously until they are achieved.

- a) Sets challenging but achievable goals
- b) Focuses efforts on a few high-priority goals
- c) Sets clear goals and objectives for meetings and projects
- d) Maintains persistent commitment to goals, in the face of obstacles and frustrations
- e) Exerts unusual, sustained effort over time, to achieve intended results
- f) Demonstrates a high capacity for work; is highly productive
- g) Demonstrates a strong sense of urgency about solving problems and getting work done; pursues objectives aggressively
- h) Does the work of another group or individual when necessary to ensure that a task is done and the project can move forward.
- i) Develops a different approach, when necessary to complete the project on schedule or with the available resources.

### **7. Service Orientation**

Definition: Demonstrated concern for satisfying one's external and/or internal customers.

- a) Lives the business mission: to be the preferred supplier through total customer satisfaction
- b) Quickly and effectively solves customer/member problems
- c) Talks to customers (internal or external) to find out what they want and how satisfied they are with what they are getting
- d) Lets customers know he/she is willing to work with them to meet their needs
- e) Finds ways to measure and track customer/member satisfaction
- f) Presents a cheerful, positive manner with customers

## 8. Initiative

Definition: Identifying what needs to be done and doing it before being asked to or required by the situation.

- a) Identifies what needs to be done and takes action before being ask or required to
- b) Does more than what is normally required in a situation
- c) Seeks out others involved in a situation to learn their perspectives
- d) Takes independent action to change the direction of events

## 9. Thoroughness

Definition: Ensuring that one's own and other's work and information are complete and accurate; careful preparation of documents and reports and for meetings and presentations; following up with others to ensure that agreements and commitments have been fulfilled.

- a) Sets up procedures to ensure high quality of work (e.g., review meetings)
- b) Monitors the quality of work
- c) Acts to verify information
- d) Checks the accuracy of own and other's work
- e) Develops and uses systems to organize and keep track of information or work progress
- f) Carefully prepares for meetings and presentations
- g) Organizes information or materials for others
- h) Carefully reviews and checks the accuracy of information in work reports (e.g., production, sales, financial performance) provided by management, management information systems, or other individuals and groups

## III. Self Management

### 10. Self Confidence

Definition: Faith in one's own ideas and ability to be successful; willingness to take an independent position in the face of opposition.

- a) Is confident of own ability to accomplish goals

- b) Presents self crisply and impressively
- c) Is willing to speak up to the right person or group at the right time when he/she disagrees with a decision or strategy
- d) Approaches challenging tasks with a “can-do” attitude

## **11. Personal Credibility**

Definition: Demonstrated concern that one be perceived as responsible, reliable, and trustworthy.

- a) Does what he/she commits to doing
- b) Respects the confidentiality of information or concerns shared by others
- c) Is honest and forthright with people
- d) Carries his/her fair share of the work load
- e) Takes responsibility for own mistakes; does not blame others
- f) Conveys a command of the relevant facts and information

## **12. Flexibility**

Definition: Openness to different and new ways of doing things; willingness to modify one’s preferred way of doing things.

- a) Is able to see the merits of perspectives other than his/her own
- b) Demonstrates openness to new ways of doing things and to new or different methods, procedures, and technology.
- c) Switches to a different strategy when an initially selected one is unsuccessful
- d) Demonstrates willingness to modify a strongly held position in the face of contrary evidence



## **C. OVERVIEW OF MOST IMPORTANT RESPONSIBILITIES OF MARKETING REPRESENTATIVES**

1. Sell and Enroll Members (Production)
2. Establish and Maintain Relationships within the Community
3. Produce Quality Work in Compliance with Company Policies and Government Regulations
4. Educate and Assist Prospects, Members, Community Leaders, and Associates
5. Retain Customers (Members)

## **D. DESCRIPTION OF MOST IMPORTANT RESPONSIBILITIES**

### **Responsibility 1. Sell and Enroll Members (Production)**

#### Major Tasks

- Develop and execute a plan to source new prospects.
- Search and develop new marketing sites.
- Create and maintain customer/member relationships
  - Learn the product (health insurance) and its applications.
  - Identify prospects' and members' needs and solve their problems.
  - Assist potential members with the enrollment process.
  - Follow-up "delivery" of insurance coverage.
  - Provide customers/members with helpful information.
  - Always fulfill customer/member commitments and promises.
- Identify and close sales/enrollment opportunities.
  - Use a good closing technique and ask for the "order".
  - Act as a team member and refer business/leads/referrals to other reps.
  - Take advantage of opportunities for team selling.
- Maintain high level of personal organization.

#### Performance Criteria

- Number of approved enrollments submitted each month
- Growth in enrollments
- Sales penetration in assigned territory

- Call reports/itineraries, time usage
- Feedback from prospects, members, and
- Feedback from management

#### Required Competencies

- Results Orientation
- Initiative
- Persuasive Communications
- Influencing Others

### **Responsibility 2. Establish and Maintain Relationships within the Community**

#### Major Tasks

- Partner with community based organizations (CBO).
- Obtain approval of owners of businesses to host exhibits and informational tables/booths
- Develop established referral base
- Obtain leads from community events and established relationships
- Establish and maintain positive relationships (and a network) with community organizations, provider offices, faith based organizations.
- Enhance the company's presence in the community.
- Organize and/or staff community events, promotional events, staff exhibits, and health fairs.
- Identify and communicate cultural issues and concerns to management.
- Be a resource on healthcare issues to the community.

#### Performance Criteria

- Number of applications
- Questions from individuals
- Number of contacts
- Number of presentations
- Number of invitations to community events
- Number of businesses allowing \_\_\_\_\_ informational tables

#### Required Competencies

- Building Collaborative Relationships

- Cultural Sensitivity
- Self Confidence
- Flexibility
- Initiative

### **Responsibility 3. Produce Quality Work in Compliance with Company Policies and Government Regulations**

#### Major Tasks

- Ensure that applications are “clean”, i.e. completed accurately, in a timely way, with the necessary supporting documents.
- Provide quality service.
- Go beyond the immediate transaction to ensure future compliance and secure new business.
- Keep scheduled appointments.

#### Performance Criteria

- Number of errors in applications
- Percent of completions
- Number of responses
- Appearance of applications
- Scheduled appointments kept

#### Required Competencies

- Thoroughness
- Results Orientation
- Knowledge of regulations
- Personal Credibility

### **Responsibility 4. Educate and Assist Prospects, Members, Community Leaders, and Associates**

#### Tasks

- Train and educate prospects on the importance of healthcare and the services a managed care organization provides.
- Provide assistance, outreach and/or guidance to members and potential members regarding benefit and enrollment issues questions, and social service needs.

- Support health education activities and refer members to health education programs.
- Communicate details and the benefits of \_\_\_\_\_'s health plans.
- Link insurance plans to needs.
- Provide the customer/member with a steady flow of useful information that meets their needs.

#### Performance Criteria

- Number of infractions
- Number of complaints

#### Required Competencies

- Persuasive Communications
- Influencing Others
- Cultural Sensitivity
- Self Confidence

### **Responsibility 5. Retain Customers (Members)**

#### Major Tasks

- Contact and follow up with members.
- Be a resource to the membership.
- Prior to re-certification date, telephone and send letters to members.
- Assist member with the recertification process.
- Assists with retention activities necessary to ensure resolution for members and potential members regarding continuity of care issues.
- Influence the addition of providers, where needed.
  - Obtain recommendations from members
  - Contact doctors
  - Recommends providers to manager

#### Performance Criteria

- Number of re-certifications per week
- Department service standards met

#### Required Competencies

- Service Orientation
- Interpersonal Awareness

- Personal Credibility
- Initiative

**E. LINKS BETWEEN MAIN RESPONSIBILITIES AND COMPETENCIES**

<b>Competencies</b>	<b>1. Sell and Enroll Members (Production)</b>	<b>2. Establish and Maintain Relationships within the Community</b>	<b>3. Produce Quality Work in Compliance with Regulations</b>	<b>4. Educate and Assist Members and Potential Members</b>	<b>5. Retain Customers (Members)</b>
<b>1. Interpersonal Awareness</b>		<b>Moderate</b>		<b>Moderate</b>	<b>High</b>
<b>2. Influencing Others</b>	<b>High</b>	<b>Moderate</b>		<b>High</b>	<b>High</b>
<b>3. Building Collaborative Relationships</b>	<b>Moderate</b>	<b>High</b>		<b>Moderate</b>	<b>Moderate</b>
<b>4. Persuasive Communications</b>	<b>High</b>	<b>Moderate</b>		<b>High</b>	<b>Moderate</b>
<b>5. Cultural Sensitivity</b>	<b>Moderate</b>	<b>High</b>		<b>Moderate</b>	<b>High</b>
<b>6. Results Orientation</b>	<b>High</b>	<b>Moderate</b>	<b>High</b>		<b>Moderate</b>
<b>7. Service Orientation</b>		<b>Moderate</b>		<b>Moderate</b>	<b>High</b>
<b>8. Thoroughness</b>			<b>High</b>		
<b>9. Initiative</b>	<b>High</b>	<b>High</b>		<b>Moderate</b>	<b>High</b>
<b>10. Self Confidence</b>	<b>High</b>	<b>High</b>		<b>Moderate</b>	<b>Moderate</b>
<b>11. Personal Credibility</b>	<b>Moderate</b>	<b>Moderate</b>		<b>Moderate</b>	<b>High</b>
<b>12. Flexibility</b>	<b>Moderate</b>		<b>High</b>		<b>High</b>

## **F. KNOWLEDGE REQUIREMENTS\* FOR MARKETING REPRESENTATIVES**

1. Product Knowledge
  - Family Health Plus
  - Child Health Plus
  - Managed Care
  - Managed Long Term Care
2. State and federal government regulations affecting health insurance
3. Competitors' Products
  - Mandatory Disclosures
  - What distinguishes \_\_\_\_\_
4. Community organizations and their leaders.
5. The culture and language of people in assigned territory/group
6. Company and group knowledge re:
  - Goals, targets, and strategies
  - Knowledge of how to get things done within \_\_\_\_\_
  - Procedures
  - Administrative system

\*Can be acquired through training. Required, but not included in Section H (recommendations on ensuring that Marketing Reps have the required competencies).

**G. FUTURE SCAN**  
**POTENTIAL CHANGES AFFECTING THE JOB IN THE FUTURE**

<b>Changes</b>	<b>Impact</b>
Market saturation	Fewer prospects
Technology advances applications	Use of laptop computers, online
Restrictions on use of RV's	Less street marketing
Restrictions on who qualifies	Fewer prospects
Combination of plans	Larger and stronger competitors
Competition with hospitals different plans	Need new strategy; new or
More informed prospects approaches needed	More sophisticated selling

**Summary:** Will need marketing reps with the required competencies identified in this job model, plus additional and/or different sales experience, competencies and tools to sell to a more informed consumer of healthcare insurance in a more sophisticated market.



## H. RECOMMENDATIONS ON ENSURING THAT MARKETING REPS HAVE THE MARKETING REPRESENTATIVE COMPETENCIES

Selection involves assessing candidates or staff to ensure that they have demonstrated a certain level of the competency before placing them in a marketing rep position.

Development involves enabling people to learn on the job through observing marketing reps, trying out competency-related behaviors, and receiving coaching and mentoring.

Training involves providing candidates with structured courses and learning experiences.

COMPETENCY	RECOMMENDATIONS		
	Select	Develop	Train
1. Interpersonal Awareness	✓*	✓	✓
2. Influencing Others	✓*	✓	✓
3. Building Collaborative Relationships	✓*	✓**	✓****
4. Persuasive Communications	✓*	✓**	✓****
5. Cultural Sensitivity	✓*	✓	✓
6. Results Orientation	✓*	✓**	
7. Service Orientation	✓*		✓****
8. Thoroughness	✓*	✓**	✓****
9. Initiative	✓*		
10. Self Confidence	✓*		
11. Personal Credibility	✓*	✓	✓
12. Flexibility	✓*		

\* Select to ensure that candidates possess at least a moderate level.

\*\* Develop to a high level.

\*\*\* Train to a high level, through courses in sales, customer relations, communications, interpersonal relations, self-management and organization, product knowledge, etc.