



INSURANCE | EMPLOYEE BENEFITS

Director, Medicare & Individual Health Insurance

These are the *fundamental* components of the job:

Oversee all sales operations for our Medicare and Individual Health Insurance division. Develop, lead, implement and promote long-term strategies that support the agency's overall growth goals and objectives, including mergers, acquisitions and revenue growth in Medicare.

- Train and manage a team of Medicare sales consultants, including performance tracking against sales goals, adherence to ethical sales practices, and onboarding and training of new sales consultants across Lawley's footprint
- Ensure organizational compliance with all federal and state Medicare regulations including CMS (Center for Medicare & Medicaid services) guidelines and updates
- Conduct training and communications for staff on Medicare compliance requirements and best practices
- Collaborate with Lawley's marketing team to develop and execute lead generation campaigns, events, and community outreach initiatives while ensuring compliant messaging and outreach
- Collaborate with Medicare service team lead to ensure consistency in messaging and processes, coordinate efforts during key enrollment periods (AEP, OEP, SEP) to ensure sales consults have appropriate support
- Work with leaders across the organization to implement effective cross-selling campaigns
- Understand the requirements of existing clients and ensure their needs are being met and/or exceeded to drive retention while maintaining scalability
- Monitor financial targets, budgets and key metrics of the Medicare Division. Support and leverage technology and resources to drive consistency and create efficiencies

Other *functions* of the job:

- Support all Lawley initiatives as requested, guided by company values, sales culture, business needs and scorecard

Skills / traits that we value for this role:

- A minimum of 7+ years of sales leadership and Medicare & Individual Health industry experience with significant time and responsibilities spent in a leadership and management role
- Demonstrated track record of building, leading, and motivating successful sales teams in a highly regulated environment
- Deep understanding of CMS regulations and Medicare compliance requirements
- Strong strategic planning, business development, and market expansion skills
- Life Accident & Health License; Professional Designations (AHIP and FWA required annually, CMS Medicare compliance training, etc.)

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- Excellent organization, planning and prioritization skills
- Relevant knowledge of insurance products, documents and usages Creative strategist with excellent organizational, delegation and collaborative leadership skills, all levels
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- Word, Excel and Outlook proficiency; familiarity with Medicare related sites and concepts involving Agency Management Systems
- Incredible attention to detail and organizational skills
- Open to continuing education, or equivalent industry designations
- Positive attitude and precise communication skills, even in a fast-paced environment. Methodical, yet swift decision-making skills
- Willingness to travel approximately 15% of the time; primarily within Western and Southern New York State, and emerging market territories
- A passion to make customers and coworkers feel important and valued



A bit about Lawley!

- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (celebrating 70 years in 2025!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Position offers potential for an annual performance-based bonus
- Outstanding Benefits (Medical, Dental, Vision—and SO many more)
- Ample PTO (prorated based on start date), a generous holiday schedule and flexibility! (Hours are 8-430)
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is \$117,814.48 to \$196,359.13.

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