



Sales & Business Development Assistant

Copic Job Description

JOB OVERVIEW

JOB TITLE	Sales & Business Development Assistant
DEPARTMENT	Sales
FLSA CLASSIFICATION	Non-exempt
REPORTS TO	Director of Sales

JOB SUMMARY

Reporting to the Director of Sales, the Sales & Business Development Assistant supports new business acquisition, focusing on individual physicians, APPs and direct sales needs across Copic markets. This role provides administrative and processing support to the Sales and Business Development teams, mainly assisting the Account Coordinator to ensure fast and accurate new business submissions through the sales pipeline.

KEY RESPONSIBILITIES

➤ Processing of New Business/Direct Sales

Percent of Time: 45%

- New business intake and inbox management (monitor shared inbox, acknowledge submissions, route requests, and ensure coverage during team absences).
- Submission and quote processing support (enter data, compile/validate documentation, ensure completeness prior to Underwriting handoff, and follow up on outstanding items).
- Proposal and template support (prepare proposals using approved templates; maintain proposal/template libraries; coordinate updates with Marketing & Communications).
- Tracking and reporting (maintain basic tracking of submissions/quotes/issued policies; flag delays; provide status updates as needed).
- Cross-functional coordination (partner with Underwriting and other internal teams; route questions appropriately; maintain clear documentation and consistent process standards).

➤ Sales & Business Development Support

Percent of Time: 15%

- New business intake for programs and Outlook inbox management.
- Submission and quote processing support (enter data, compile/validate documentation, ensure completeness prior to Underwriting handoff, and follow up on outstanding items for programs/BD).
- Proposal and template support (prepare proposals using approved templates; maintain proposal/template libraries; coordinate updates with Marketing & Communications) when needed.
- Tracking and reporting (maintain basic tracking of submissions/quotes/issued policies; flag delays; provide status updates as needed).

➤ **Customer Service**

Percent of Time: 20%

- Provides customer service support by answering sales process questions from clients, agents, and prospects; partnering with Underwriting to resolve application issues; and notifying insureds when coverage is approved to confirm understanding and address any remaining questions.

➤ **General Office Support**

Percent of Time: 15%

- Provides general office support and completes other administrative tasks as needed.

➤ **Other Duties Assigned by the Director**

Percent of Time: 5%

REQUIRED QUALIFICATIONS & SKILLS

- High school diploma or equivalent.
- Overall knowledge of Microsoft Office Products including Word, Excel, PowerPoint and database management.
- General knowledge of insurance business.
- Strong written and verbal communication skills.
- Excellent phone & customer service skills.
- Ability to calmly prioritize needs and balance multiple projects
- Strong organizational skills.
- Accountable and results oriented.
- Ability to develop a good working relationship with internal department staff members and agents.
- Ability to work independently.

DESIRED QUALIFICATIONS & SKILLS

- College education and/or degree.
- Current Property and Casualty Insurance license.

WORKING CONDITIONS

- Typical Office Environment
- Hybrid Schedule. Office located in Denver, Colorado
- Minimal travel by car, less than 10%
- Schedule: Full-Time, 40 hours per week. Business Hours: 8am-5pm MST



About Copic

Copic's mission is to improve medicine in the communities we serve. We strive to be the premier diversified service organization providing professional liability insurance and other needs of the health care community through advocacy, innovation, and the commitment and dedication of our employees.

We offer competitive wages, a comprehensive and highly sought-after benefits package, and a great work environment with fun, friendly people who truly enjoy their work. Hiring range for this position is \$22.35/hour to \$27.94/hour.

Disclaimer: *This is not meant to be comprehensive. Job duties and/or qualifications are subject to change depending on business need.*