

Job Description

Job Title:	Business Advisor
FLSA Status:	Exempt
Department:	Business Solutions
Reports to:	Chief Operating Officer

Position Mission: Help grow and deliver OIA’s perpetuation, valuation, and overall business planning advising services to help promote, protect, and progress independent agents into the future. Provides support and/or guidance in all phases of an agency’s perpetuation process from valuation to business planning to additional post-sale consulting options. Build meaningful relationships with necessary 3rd parties to fully execute on an agent’s needs at each step in the process. Helps to identify and communicate thoughtful insights and provide input to the agency and any other business stakeholder(s).

Support new products and services development efforts. Engage with agents, company partners, other state affiliates and potential partners to research, develop and implement new product and services which will make independent agents more successful in the modern insurance marketplace. Explore partnership opportunities that will position OIA as a market differentiator and leverage our trusted relationship with independent agents to bring them business solutions that solve their unique challenges in the marketplace.

Education and Experience: Four-year college degree, business graduate degree preferred. Strong business acumen and marketing experience is required (minimum of 4 years). Experience in designing or delivering consulting solutions and business to business sales experience a plus. Background in Property & Casualty insurance (minimum of two years preferred, but not required).

Required Certificates, Licenses, and Registrations: Property & Casualty license or other insurance or business designations preferred. Certified Valuation Analyst (CVA), Accredited Valuation Analyst (AVA), Certified Business Appraiser (CBA), or other related designations/certifications are preferred.

Mission-Critical Essential Duties and Responsibilities:

- Executes the OIA business planning and valuation consulting services along with existing team
- Able to analyze, evaluate and prepare written valuation reports based on financial statements, contracts, operational reports, agency interviews, and all other financial/data resources as needed
- Works directly with our data and/or technical experts to develop required software/reporting systems to complete valuations, business planning, compensation designs, etc. in an organized and efficient manner
- Works directly with our business development manager, carrier relationship manager, product manager, marketing team, and other teams within OIA to effectively communicate, market, and ultimately, earn the business of our members
- In conjunction with our data analyst, identifies trends in our marketplace that will allow us to offer additional support, training, products, and services to our agencies
- Able to build strong relationships and trust with insurance agency principals
- Have a strong working knowledge and/or direct experience with insurance agencies
- Knowledge of different types of ownership transfer mechanisms and relevant financial modeling
- Plans and manages execution of own work, participates in planning, and delivers on commitments
- Identifies additional opportunities to increase conversion, save costs, drive revenue
- Applies appropriate quantitative and financial techniques/methods to help solve business problems
- Support new product and services development effort
- Develop business plan and define purpose for OIA new products and services that align with OIA’s strategic initiatives
- Establish relationship as a trusted resource for independent agents, potential partners, and staff
 - Work with OIA CEO, senior staff, business development manager, and company partner manager to determine the products and services that meet our members’ needs
- Provide unique insight on current and future trends of insurance marketplace including perspective impact on independent agents

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- Develop market analysis, business plans, competitive pricing structure and expected ROI for all new potential products and services
- Collaborate with company partner manager to create funding sources to support new product and service offerings through company partner relationships
- Leverage internal database to identify market trends, quantify the potential market need and track results of new product and service offerings
- Perform any other related duties as required or assigned

Essential Characteristics:

- Organized, detail-oriented
- Pro-active, ambitious
- Analytical skills, solutions oriented and ability to translate trends into potential solutions and revenue source
- Intellectual curiosity and inquisitive
- Confident – has a desire to establish oneself as a thought leader in the insurance business marketplace
- Happy, personable, exudes positive energy
- Enjoys working closely with a team
- Excellent verbal and written communication skills
- Active listening and strong presentation and sales skills
- Ability to multi-task, prioritize, and manage time effectively

Other Skills and Qualifications:

- Must have working knowledge of Microsoft Office programs
- Experience with Salesforce or other CRM software programs is preferred; must have the ability and desire to learn these programs if experience is limited
- Ability to read and understand documents such as financial statements, strategic plans, perpetuation plans, policy manuals, safety rules, operating and maintenance instructions, and procedure manuals
- Ability to support marketplace research efforts. Ability to gather research and prepare surveys with leading software programs – SurveyMonkey, Google Forms, Zoho, Typeform, etc.
- Ability to analyze independent insurance agency and carrier marketplace
- Ability to write business reports and correspondence
- Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions, and decimals.
- Ability to compute rate, ratio, and percent and to prepare and interpret bar graphs
- Ability to solve practical problems and deal with a variety of known variables in situations where only limited standardization exists
- Ability to interpret a wide variety of instructions furnished in written, oral or diagram formats
- This position will require moderate travel around Ohio.

Core Values and Conduct: Every member of OIA expects our staff to embrace and act in good faith to demonstrate: Integrity, Collaboration, Innovation, and Commitment. We expect of ourselves and our coworkers to contribute to our top Critical Cultural Outcomes by acknowledging them, and working toward them, every day:

- Commitment to Overall Goals of the Organization
- Shared Purpose
- High Trust Environment
- Accountability
- Honest-Direct-Respectful Communication
- Consistency of Management

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Physical Activities and Environment: The following physical activities described are representation of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions and expectations.

While performing the functions of this job, the employee is continuously required to talk or hear; frequently required to sit; and occasionally required to stand, walk, use hands to finger, handle or feel, reach with hands or arms. The employee must occasionally lift and/or move up to 25 pounds. The noise level in the work environment is usually moderate.