



## CRUMDALE — PARTNERS —

### Quoting Coordinator

**Workplace type:** Hybrid

**Job type:** Full-time

#### **About Crumdale Partners:**

Crumdale Partners is a diversified insurance firm providing custom, self-funded healthcare solutions to a limited distribution network of brokers, consultants, and agents nationwide. Ranked on the Inc. 5000 Fastest Growing Companies and Best Workplaces, we leverage industry expertise, superior talent, data analytics, and a disruptive mindset to manufacture, underwrite, and administer agile, transparent, and cost-saving solutions. We optimize the fragmented health benefits supply chain to reduce health benefit costs and create better outcomes for employers and employees.

At Crumdale, people come first. We strive to make a positive impact on the people we serve. We believe this starts with the passion and purpose of our team. Our company culture is rooted in alignment, innovation, and integrity.

#### **About the Job:**

Crumdale Partners is currently looking to fill the position of Quoting Coordinator. This is an exciting opportunity for one of the fastest growing companies in the country. As the Coordinator of the proposal process, you will play a vital role in ensuring the success of our new business and renewal activities. The role includes analyzing data, reviewing, and preparing quote documents, and collaborating with multiple departments. The ideal candidate will have superior organizational skills with sharp attention to detail.

#### **Duties & Responsibilities:**

- Responsible for the timely delivery of accurate proposals to our Sales and Account Management teams.
- Follows up with Sales and Account Management teams for information and data requests.
- Creates the Crumdale Partners' response to formal RFPs from our broker partners.
- Communicates with vendor partners to secure the best price for our clients and prospects.
- Analyzes quotes for appropriateness and questions vendors on inadequate responses.
- Creates client-ready proposals for both new business and renewals.
- Reviews work completed by our external teams for accuracy and completeness.
- Works closely with Sales and/or Account Executive to provide a proposal that best represents the Producer's strategy with that account.
- Participates in internal kick-off meetings for each sold account while preparing the Sold Case Sheet for Finance.
- May prepare reports as requested by Account Executive or Sales Team.
- Maintains the day-to-day process in Salesforce for each opportunity while ensuring that all tasks are completed on or before scheduled deadlines.



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**Qualifications & Skills:**

- 2 years' experience with employee benefits either with an insurance carrier or broker/consultant.
- A basic working knowledge of self-funded group health plans including stop-loss.
- Strong problem-solving skills involving multiple variables in standard situations.
- Extremely detail oriented with a demonstrated ability to meet deadlines with error-free work.
- Ability to prioritize and handle multiple tasks in a demanding, fast-paced work environment.
- A conscientious team player who can also work independently when required.
- Intermediate knowledge of MS Office products (Word, Excel, PowerPoint, Outlook, Teams), a basic knowledge of Adobe Acrobat, and a willingness to learn new technology.
- A desire to grow beyond the position itself by showing initiative to learn something new.
- Bachelor's degree preferred.
- Current Health & Life license or ability to earn one within 90 days of hire.

**Benefits:**

- Medical Insurance
- Vision Insurance
- Dental Insurance
- 401(k)
- Disability Insurance