



## Job Description **SENIOR VICE PRESIDENT & CHIEF SALES OFFICER**

### **OVERVIEW**

The Senior Vice President & Chief Sales Officer will lead UHA's commercial membership growth and retention across broker/PEO/3rd party administrators and direct channels. Set strategy, build a healthy pipeline, improve forecast accuracy, strengthen all sales channel relationships, and ensure all sales practices meet UHA ethics, compliance, and privacy standards. In addition, this role will focus on building and scaling a high-performing sales team, developing strategic partnerships, and ensuring competitive positioning within the commercial market space from a product, price, and technology (end user tools) perspective.

### **ESSENTIAL DUTIES & RESPONSIBILITIES**

- Strategy & Revenue Leadership: Set a multi-year growth plan and targets for small, mid, and large group segments with clear plans for each segment, the right channel mix (broker and direct), and island coverage. Own sales, revenue growth, and first year retention; drive realistic targets and regular performance reviews. Align pricing and offer structures with Finance, Underwriting, and Actuarial departments, in line with UHA's Risk Appetite.
- Service Engagement Across all Distribution Channels: Create goals and client engagement strategies targeted to each channel to ensure long term retention and growth.
  - Brokers - segment producers, define service levels, create producer scorecards, and build joint business plans. Improve Broker of Record (BOR) processes and how BOR changes are managed—clear steps, timely execution, and strong documentation.
  - Direct - oversee lead-generation activities; expand targeted outreach to employers and associations.
  - PEO - establish and maintain rapport with Professional Employment Organizations with executives and sales staff. Align goals and objectives to establish referral partnerships.
- Business Development: Develop and identify new markets and distribution channels.
- Marketing: partner with marketing and client services to strengthen brand reputation and enhance the customer experience.
- Sales Operations & CRM: Enforce consistent Salesforce use—standard stages, clean data, and disciplined forecasting. Publish forecasts with stage conversions and win/loss insights. Build essential enablement (proposals, renewal calendar, competitive comparisons, and simple playbooks). Ensure timely and efficient onboarding of new customers. Ensure effective use of CRM and other sales enablement tools (including AI) that aids in proper pipeline management, analytics, KPI tracking and timely reporting.
- Cross-Functional Collaboration: Partner with Client Services, Employer Services, Healthcare Services, and Information Services for smooth onboarding, fast issue resolution, and expansion



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opportunities grounded in customer experience. Coordinate with Marketing on demand generation and events; integrate industry and competitor challenges and opportunities into marketing strategy. Lead and influence complex, cross-functional initiatives, partnering closely with executive peers and department leaders to drive company-wide priorities beyond sales.

- Fiscal Responsibilities: Oversee preparation and monitoring of department and sales channel expenses. Optimize budget for effective use of funds.
- People Leadership: Recruit, coach, and develop the Sales team; set clear goals, provide coaching, and build an accountable, ethical, high-energy culture.
- Compliance, Ethics & Privacy: Ensure all sales activities comply with laws, licensing requirements, and UHA's policies; complete and enforce required training; maintain documentation and audit readiness.

### **REQUIRED EDUCATION & EXPERIENCE**

The individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Bachelor's degree or equivalent years of experience
- 10+ years progressive sales experience with strong results; sales management; experience with health insurance, brokerage, commercial employee benefits, or 5 + years at VP/SVP+ level preferred.
- Knowledge of plan benefits, competitor offerings, and pricing concepts.
- Strong Salesforce/CRM skills; excellent written and verbal communication.
- Active community engagement (boards, chambers, or industry groups).
- Must maintain an active Insurance Producer License

### **PREFERRED & ADVANCED QUALIFICATIONS**

- Deep relationships with Hawai'i employers and the broker community.
- Demonstrated ability to win large customers (for health insurance, 200+ subscribers) and lead both employed sales teams and broker channels.
- Experience with health insurance, employee benefits, or 2-5 years at VP/SVP+ level preferred.

### **PHYSICAL DEMANDS / WORKING CONDITIONS**

The work environment characteristics described here are representative of those associate encounters while performing the essential functions of this job.



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See Associate Handbook – Employment Policies – Position Descriptions for general work environment.

### **HOURS OF WORK**

See Associate Handbook – Employment Policies – Work Schedule and Attendance.

### **EQUIPMENT AND SOFTWARE USE**

See Associate Handbook – Employment Policies – Position Descriptions for general list of equipment for that applies to all positions.

### **VEHICLES**

- Must have a valid driver's license and proof of automobile insurance in accordance with UHA required minimums (see Use Of Personal Or Rental Vehicles And Mileage Reimbursement Policy number A-012 in the UHA Policy and Procedure Manual)
- Must be able to travel by airplane to neighbor islands as necessary.
- UHA is an equal opportunity employer. This position description is not contractual and is subject to change.

Target Compensation: \$200,000 - \$230,000 base salary plus incentive bonus

For detailed information, please visit <https://www.inkinen.com/uha-cso>