



GROUP BENEFITS SALES EXECUTIVE

Position Title: Group Benefits Sales Executive

Reports to: Eric Diamond, SVP, Director of Group Benefits

Job Description

The primary role of the Group Benefits Sales Consultant- more commonly referred to as a producer- is to generate new clients and then maintain a clientele. A producer sells solutions from a broad portfolio of high quality employee benefits insurance carriers. The best producers are energetic, competitive, and superb relationship builders who become an expert consultant to business owners and C-level executives, offering trusted advice, human resources expertise, and insurance solutions to their clients. Exceptional training and support, a competitive starting base (negotiable depending on candidate ability to validate in 30 months), renewable commissions, and generous employee benefits package are provided, plus the opportunity to earn an ownership interest in a growing, employee owned firm. Previous experience in sales is welcomed, but we are willing to train new consultants who are driven and motivated for success.

Major Responsibilities include:

- Complete structured training program and learn the Marshall & Sterling sales process
- Complete Group Benefits technical training curriculum
- Attend weekly sales meetings
- Shadow experienced producers
- Prepare new business prospecting plan
- Identify starter prospects for initial pipeline
- Identify centers of influence, networks, associations, and referral partners
- Achieve activity goals of 150-200 calls and 2+ appointments per week
- Identify multiple methods of lead generation and sources of prospects
- Generate 1 warm lead referral per week
- Implement prospecting plan to begin building robust pipeline
- Sell \$60K new commission by end of year 1
- Conduct 2+ initial prospect meetings each week.
- Advance 50% of initial prospect meetings to final sales presentation
- Make 1 final sales presentation accompanied by mentor every other week closing 50% of final sales presentations
- Achieve annual sales targets/revenue
- Begin solo prospecting and appointments by month 3
- Coordinate marketing and building proposal with the marketing team
- Coordinate enrollment meetings and related after-sale processes for a new account
- Maintain agency management system requirements using CRM system to track prospect
- Develop interdivisional cross-selling opportunities
- Communicate with Supervisor/Manager any issues to ensure excellent customer service.
- Maintain professional accreditation necessary to meet agency standards.
- Participate in continuing education programs when available.
- Build and maintain a favorable and professional work relationship with other staff members.
- Adhere to established employee manual policies and guidelines.
- Adhere to workflow procedures and follow guidelines to reduce the risk of E&O claims.
- Promptly report all E&O claims and potential E&O claims.
- Maintain confidentiality in all aspects of client, staff and agency information.
- Perform other duties and projects as assigned.



Job Description

The primary role of the Group Benefits Sales Consultant- more commonly referred to as a producer- is to generate new clients and then maintain a clientele. A producer sells solutions from a broad portfolio of high quality employee benefits insurance carriers. The best producers are energetic, competitive, and superb relationship builders who become an expert consultant to business owners and C-level executives, offering trusted advice, human resources expertise, and insurance solutions to their clients. Exceptional training and support, a competitive starting base (negotiable depending on candidate ability to validate in 30 months), renewable commissions, and generous employee benefits package are provided, plus the opportunity to earn an ownership interest in a growing, employee owned firm. Previous experience in sales is welcomed, but we are willing to train new consultants who are driven and motivated for success.

Major Responsibilities include:

- Complete structured training program and learn the Marshall & Sterling sales process
- Complete Group Benefits technical training curriculum
- Attend weekly sales meetings
- Shadow experienced producers
- Prepare new business prospecting plan
- Identify starter prospects for initial pipeline
- Identify centers of influence, networks, associations, and referral partners
- Achieve activity goals of 150-200 calls and 2+ appointments per week
- Identify multiple methods of lead generation and sources of prospects
- Generate 1 warm lead referral per week
- Implement prospecting plan to begin building robust pipeline
- Sell \$60K new commission by end of year 1
- Conduct 2+ initial prospect meetings each week.
- Advance 50% of initial prospect meetings to final sales presentation
- Make 1 final sales presentation accompanied by mentor every other week closing 50% of final sales presentations
- Achieve annual sales targets/revenue
- Begin solo prospecting and appointments by month 3
- Coordinate marketing and building proposal with the marketing team
- Coordinate enrollment meetings and related after-sale processes for a new account
- Maintain agency management system requirements using CRM system to track prospect

Desired Skills & Experience

- College degree preferred, high school diploma or equivalent required.
- Experience and knowledge of Microsoft Office programs.
- Experience with Vertafore a plus.
- Appropriate state insurance licenses and continuing education required.
- Works effectively and relates well with others including superiors, colleagues and individuals inside and outside the company in a professional manner.
- Demonstrated ability to communicate effectively.
- High level of organizational ability with attention to detail.