Position Title: Sales Executive
Reports to: Shawn Viaña- Director of Sales & Development

Job Description:

Sales oriented position requiring advanced communication skills, a thorough knowledge of insurance products available through the agency. Capable of aggressively pursuing and closing sales of new and existing commercial lines accounts and retaining book of commercial lines business. Value oriented selling process. Commission based compensation.

Major Responsibilities include:

•Achieve minimum sales and other objectives as agreed upon.
•New business growth adequate to maintain and grow overall account.
•Develop and maintain pipeline of prospects which will allow for achievement of sales and retention goals.
•Develop value proposition which encompasses personal skills and tools provided by Marshall & Sterling.
•Collect detailed risk and underwriting information.
•Develop and deliver formal proposals of insurance utilizing Marshall & Sterling's online system.
•Follow renewal work flows to ensure retention of accounts.
•Refer clients and prospects to other divisions of Marshall & Sterling.
•Delegate client service needs appropriately.
•Establish and follow through on appropriate service timelines on appropriate accounts.
•Attend all sales meetings as required.
•Collect premiums per established agency procedures.
•Follow agency E&O and workflow procedures to document activities and prevent errors and omissions losses.
•Effectively use the marketing, loss control and claims handling resources of the Agency to maximize the service provided to the client.
•Promote agency and insurance industry in the community.
•Stay educated and informed about your profession.
•Obtain required continuing education credits.
•Maintain professional accreditation necessary to meet agency standards.
•Build and maintain a favorable and professional work relationship with other staff members.
•Adhere to established employee manual policies and guidelines.
•Promptly report all possible errors and omissions.
•Maintain confidentiality in all aspects of client, staff and agency information.
•Perform other duties and projects as assigned.

Desired Skills & Experience

•Proven ability to pursue and close sales.
•Knowledge of insurance products.
•NYS Insurance Brokers License Required.
•Experience and knowledge of Microsoft Office Programs.
•Valid drivers license in state of residence and acceptable driving experience.
•Ability to communicate with and work with diverse types of individuals and groups.
•High level of organizational ability with attention to detail.