



PL SALES EXECUTIVE

Position Title: Personal Lines Sales Executive

Reports to: Yvonne McCrea, Director of Personal Lines

Job Description

Sales oriented position requiring advanced communication skills and a thorough knowledge of insurance products available through the agency. Capable of aggressively pursuing and closing sales of new and existing personal lines accounts and retaining book of Personal 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.
- Quote all new business utilizing agency's comparison rating program as well as carrier websites.
- Develop and deliver formal proposals of insurance utilizing Marshall & Sterling's online system.
- Process all new business applications and workflow according to Marshall & Sterling procedure.
- 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.
- Perform all duties as mandated by branch manager to assist with growth of Personal Lines Department.
- Attend all sales meetings as required
- Follow agency E&O and workflow procedures to document activities and prevent errors and omissions losses
- Effectively use the marketing and claims handling resources of the agency to maximize the service provided to the client.
- Promote agency and insurance industry in the community.
- Obtain required continuing education credits.
- 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.
- Promptly report all E&O claims and potential E&O claims.



Desired Skills & Experience

- Proven ability to pursue and close sales.
- Knowledge of insurance products.
- 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.
- Experience and knowledge of Microsoft Office programs.
- Experience with Vertafore a plus.
- Valid driver's license and acceptable driving record.
- Ability to communicate with and work with diverse types of individuals and groups.
- High level of organizational ability with attention to detail.