

JOB DESCRIPTION

SALES CONSULTANT - BENEFIT, BENEFIT DEPARTMENT

Summary

Under the direction of the Vice President, Benefit; create and maintain a book of business by soliciting, developing, marketing, and selling new and renewal business in accordance with applicable state insurance regulations for all product lines; work closely with the account managers to handle your clients' needs.

Essential Duties and Responsibilities

Include the following; other duties may be assigned:

- Compile lists of prospective clients to provide leads for additional business
- Contact and qualify prospective clients and explain features and merits of policies offered, recommending amount and type of coverage based on analysis of prospect's circumstances
- Provide direction to Service Team for selected accounts
- Review overall financials with Benefit Consultant
- Participate in renewal activities with Benefit Consultant
- Call on policyholders to deliver and explain policy; suggest additions or changes in insurance program
- Help policyholders and staff to settle insurance claims in the event of a loss
- Anticipate future needs and calls on established clients to renew and upgrade accounts
- Develop long-term relationships with clients and carrier representatives
- Meet or exceed sales quota goals
- Maintain insurance license(s)
- Adhere to Agency policies, procedures, and codes of conduct
- Participate in seminars and classes for skill and knowledge development
- Perform other assigned duties or functions as required to meet business objectives

Supervisory Responsibilities

There are no supervisory responsibilities for this position.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

- **Problem Solving** - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; uses reason even when dealing with emotional topics
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information
- **Planning/Organizing** - Prioritizes and plans work activities; uses time efficiently; plans for additional resources; sets goals and objectives

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- **Quality** - Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality
- **Quantity** - Meets productivity standards; completes work in timely manner; strives to increase productivity and efficiencies; works quickly
- **Safety and Security** - Observes safety and security procedures; reports potentially unsafe conditions; uses equipment and materials properly
- **Adaptability** - Adapts to changes in the work environment; changes approach or method to best fit the situation; able to deal with frequent change, delays, or unexpected events
- **Attendance/Punctuality** - Is consistently at work and on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time

Qualifications

To perform this job successfully, an 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.

- **Education and/or Experience**
Bachelor's degree (B.A.) from four-year college or university; or two to four years related experience and/or training; or equivalent combination of education and experience
- **Language Skills**
Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations; ability to write reports, business correspondence, and procedure manuals; ability to effectively present information and respond to questions
- **Mathematical Skills**
Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume; ability to apply concepts of basic algebra and geometry
- **Reasoning Ability**
Ability to solve practical problems and deal with a variety of variables in situations where only limited standardization exists; ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form

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- **Computer Skills**
Knowledge of Microsoft Office Suite, Internet Explorer, AMS Sagitta, Word Process, or other document management system, Zywave applications, Salesforce, BrokerBriefcase, account management system, AgencyFuel reporting, beginner level database management, and spreadsheet software
- **Certificates/Licenses/Registrations**
Pennsylvania Driver's License
Pennsylvania Insurance License
 - Life & Health
- **Other Skills & Abilities**
N/A
- **Other Qualifications**
N/A

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, sit, use hands and fingers, reach with hands and arms, climb or balance, stoop, kneel, crouch, or crawl, and speak or hear. The employee must occasionally lift and/or move up to 10 pounds and be able to drive a vehicle. Specific vision abilities required by this job include close vision, depth perception, and ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually quiet.