SUMMIT
Benefits • Insurance • Investments

POSITION DESCRIPTION

NAME:		**DEPARTMENT:**	Sales Development Unit
TITLE:	Employee Benefits Consultant	**STATUS:**	Full-Time
REPORTS TO:	VP of Sales	**CLASSIFICATION:**	Exempt

JOB SUMMARY/ORGANIZATIONAL IMPACT: The Employee Benefits Consultant will be responsible for producing new business for the Group Benefits Division and increasing cross marketing sales. This will be achieved by seeking out prospective clients and formally managing the sales process through Summit's CRM system, overseeing benefits implementation, and renewal processes. They will be responsible for meeting management expectations.

RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:

- Manage multiple facets of the sales process, including coordination of meetings, support materials, follow-up tasks, phone calls, proposals, presentations, closing business, etc.
- Prospect, schedule and conduct appointments with Group Benefit prospects and recommend and implement plan strategies
- Communicate feedback with carriers and maintain a good relationship with them to facilitate continued cooperation.
- Explain features, advantages, and disadvantages of various policies to promote sale of plans.
- Continuously stay abreast of insurance products, plans, representative and insurance regulation changes through industry communications, meetings, webinars and continuing education.
- Input accurate and timely information into sales automation platform (CRM) relative to first appointments, follow-up appointments, conceptual/finalist meetings, etc. to facilitate realistic corporate sales and revenue projections.
- Perform related responsibilities and general administrative duties as required or assigned.
- Recognize areas of weakness, provide suggestions, and update documentation for process improvement.

REQUIRED QUALIFICATIONS

Knowledge

- **Customer and Personal Service.** Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- **Clerical.** Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, designing forms, and other office procedures and terminology.
- **Insurance (Health and Welfare).** Knowledge of the insurance industry as it relates to medical plans and third-party administrators.
- **Sales.** Knowledge of industry products and services and how to identify needs and provide solutions**.**

Skills

- **Active Listening**. Giving full attention and respect to leadership, coworkers, and clients. Taking time to listen to what people are saying and understand the points being made. Provide empathy to client needs while asking questions when necessary.
- **Speaking**. Talking to others to convey information effectively.
- **Service Orientation**. Actively looking for ways to help coworkers and clients.
- **Critical Thinking**. Using logic and reasoning to identify how best to solve or address questions, issues, and projects, and thinking ahead to determine potential issues or solutions.
- **Social Perceptiveness**. Being aware of others' reactions and understanding why they react as they do.
- **Persuasion**. Persuading others to change their minds or behavior.

Abilities

- **Oral Expression**. The ability to communicate information and ideas in speaking so others will understand.
- **Speech Clarity**. The ability to speak clearly so others can understand you.
- **Problem Sensitivity**. The ability to tell when something is wrong or is likely to go wrong by being proactive instead of reactive.
- **Written Expression**. The ability to communicate information and ideas effectively in writing so others will understand. This also includes using proper grammar and spelling.
- **Judgment and Decision Making.** The ability to use ethical principles and sound judgment when faced with making difficult decisions.
- **Team Player.** The ability to work cooperatively and effectively in a team environment to accomplish group goals.

Experience:

- Previous experience in the employee benefits industry with a focus on sales
- Experience using Microsoft Office Suite; Experience using Microsoft Office 365; Outlook, OneDrive, SharePoint, and Dynamics preferred.

Education Required:

- Bachelor's degree preferred.

Certifications/Licenses:

- Active Life, Accident & Health (and other applicable lines of authority) insurance licenses for the states in which accounts are sold.
- Active General Lines Property & Casualty insurance license recommended.