



POSITION DESCRIPTION

NAME:		DEPARTMENT:	Sales Development Unit
TITLE:	Sales Executive, Risk Management	STATUS:	Full-Time
REPORTS TO:	VP of Sales	CLASSIFICATION:	Exempt

JOB SUMMARY/ORGANIZATIONAL IMPACT: The Sales Executive is an outside sales role that focuses primarily on new client acquisition for the organization. This will be achieved through meeting with prospective clients, presenting the Summit story, and managing the sales process. The Sales Executive should stay abreast and be knowledgeable about insurance legislation and regulations of which they sell. The Sales Executive should maintain a consultative relationship with prospective clients and assist with plan design.

RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:

- Responsible for bringing new business to Summit.
- Seek out new clients and develop clientele by networking to find new customers and generate lists of prospective clients.
- Uncover and identify prospect needs, primary goals and corporate and departmental objectives.
- Responsible for planning, scheduling and executing large projects.
- Explain features, advantages, and disadvantages of various policies to promote sale of insurance plans.
- Able to influence outcomes beyond the scope of their individual responsibilities.
- Works on complex issues where analysis of situation or data requires evaluation of a variety of factors, including an understanding of current trends.
- Demonstrate strategic thinking and innovation based on knowledge of the market, carriers, and products.
- Must possess extensive knowledge and experience in the insurance industry.
- Recognize areas of weakness, provide suggestions, and update documentation for process improvement.
- Perform general and administrative duties as assigned.

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, stenography and transcription, designing forms, and other office procedures and terminology.

Skills

- **Active Listening.** Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- **Speaking.** Talking to others to convey information effectively.
- **Service Orientation.** Actively looking for ways to help people
- **Critical Thinking.** Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- **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. It does not involve solving the problem, only recognizing there is a problem.
- **Written Expression.** The ability to communicate information and ideas in writing so others will understand.

Experience:

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

Education Required:

- Bachelor's degree preferred.

Certifications/Licenses:

- Active General Lines Property & Casualty insurance license.
- Active Life, Accident & Health (and other applicable lines of authority) insurance licenses recommended.