POSITION DESCRIPTION

Position Title: Client Advisor, Business Insurance
Department*:* Business Insurance
Reports To: Director of Sales
FLSA Status*:* Exempt

SUMMARY

Sell business insurance and coordinate service to new and existing clients.

ESSENTIAL RESPONSIBILITIES

- Achieve objectives established in annual Client Advisor sales plan.
- Prospect for new business from identified target groups.
- Anticipate future needs for established clientele to renew and upgrade accounts.
- Contact and qualify prospective clients for the purpose of examining current coverage and determining insurance needs.
- Collect detailed risk management and underwriting information including survey data and loss history.
- Develop and deliver formal proposals of insurance including details of coverage, limits, deductibles, and other pertinent information.
- Collaborate with Business Insurance Account Service Manager to ensure complete company submissions and account service, including claims issues.
- Maintain production reports and attend all sales meetings as required.
- Develop long-term relationships with clients and underwriters.
- Promote agency and insurance industry in the community.
- Keep informed regarding industry information and marketplace changes to continuously improve knowledge and performance.
- Develop positive working relationships with clients and company personnel.
- Work as a team with other staff members to achieve production and agency goals.
- Perform other specific duties and projects as assigned by agency management.

QUALIFICATIONS

Candidates should have a bachelor's degree and a minimum of three years business to business sales experience; however, appropriate experience may be substituted. Candidates must hold or be willing to secure an active agent's license.