

Sales and Relationship Manager Job Description

Job Title: Sales and Relationship Manager
Reports To: Karen Obendorf – Director of Producer Sales & Promotions
Department: Marketing

Position Summary:

- Build and cultivate relationship with external customers to generate new sales.
- Take incoming sales calls, make outgoing sales calls and respond to inquiries via email.
- Provide feedback from producers on industry and product enhancements.
- Salary Range \$40K - \$50K, plus incentive compensation and benefits.

Essential Duties of the position:

1 Generate new Sales of Legacy Exclusive Products to include: 70%

- Drive new premium by engaging producers and wholesalers to do business with Legacy. Takes and makes a minimum of calls per day.
- Build relationships with producers, wholesalers and their staff through inbound and outbound calls for the specific purpose of generating new sales. Calls may include product inquiries and various agent information and status.
- Motivate producers and wholesalers through education on Legacy's exclusive products and appropriately position them against the competition.
- Assist with case design, product recommendations, and competitive analysis.
- Process all inquiries generated from inbound and outbound call campaigns including but not limited to: faxing/emailing illustrations/sales quotes and marketing materials, on line supply orders, incentives, feedback from the field, and registration for Legacy events.

2 Communication and Compliance: 20%

Adhere to contractual and compliance related procedures and guidelines.

- Maintain diary notes and producer profile information in our data base with respect to communication generated by inbound and outbound sales calls.
- Collaborate with internal departments to coordinate exceptions to be granted for New Business, any marketing programs, commissions and incentive programs.
- Provide "feedback from the field" to dept. manager that can help to determine future competitive product and program offerings as well as share constructive feedback to improve any sales/service issues.
- Assist in resolving escalated debit balance issues as needed.

* Legacy Essential Duties

10%

Total = 100%

Minimum Requirements to Perform Essential Duties of the Position:

- 1 2+ years of inside sales – preferably in the Financial and/or Insurance Sales industry
- 2 Must be comfortable with extended telephone coverage, calling insurance producers nationwide (over 70% of the day)
- 3 Proven ability to sell and close deals in a highly competitive environment
- 4 Strong written communication skills
- 5 Intermediate level of skills w/Microsoft office; Outlook, Excel, Word, PowerPoint.
- 6 Strong problem solving skills and the ability to perform under pressure in a calm manner.
- 7 Ability to multi-task in a constantly changing environment. Excellent organization skills.
- 8 Ability to work collaboratively within a team environment.
- 9 Ability to work independently without immediate supervision.
- 10 Highly refined presentation Skills
- 11 Ability to work remotely

Ideal/Preferred Requirements to Perform Essential Duties of the Position:

- 1 Insurance license (Life and Health)

Legacy Essential Duties:

In the spirit and support of Legacy's Corporate Culture and Work Team environment, it is the expectation that all employees will act in ways that support our Values by participating in the following:

Communication-Ensure that information is delivered effectively for positive and strong relationships.

Continuous Improvement-Strive to set and reach a higher standard in everything you do.

Flexibility- to go outside of your regular job duties to support the team, department, and organization needs.

Performance Alignment and Accountability-Create and meet objectives that are in sync with team, department, and organization goals and objectives.

Problem Solving and Conflict Resolution – Address problems and resolve conflict in a timely manner in an effort to find positive solutions and create action plans that support the bigger picture.

Recognition-Motivate co-workers by providing positive reinforcement of good to great results.

Shares Knowledge and Supports Others- Ensure the success of all team members and the organization.

Team Member Selection and Training- Participate in the acquisition and training of best possible talent.