

# Director of Field Training and Sales Enablement

## Job Description

### Open Position

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**Job Title:** Director of Field Training and Sales Enablement

**Reports To:** National Sales Director

**Department:** Sales

**Type:** Full-Time salaried position

**Salary:** \$100K + depending on experience

#### **Position Summary:**

The Director of Field Training and Sales Enablement will develop and lead training initiatives focused on sales concepts, positioning strategies, and product knowledge to support Legacy's national sales objectives. This role will design and implement training programs that improve the skills and effectiveness of our distribution partners, including IMO internal marketers, wholesalers, and financial advisors.

Through virtual and in-person methods, this role will help equip the field with tools to better position our products and overcome sales objections. The Director will also support content development and delivery for Legacy's learning platforms, events, and workshops. This position requires moderate travel 25-50% and may be based remotely.

#### **Essential Duties of the Position:**

- Develop and execute a training strategy aligned with Legacy's product offerings, sales goals, and field needs.
- Deliver engaging training presentations on sales strategies, product positioning, objection handling, and client engagement techniques.
- Support the development of digital and live training content for use across Legacy's learning platforms and events.
- Train and mentor IMO wholesalers, internal marketers, and advisors on Legacy's exclusive product suite and their application in retirement income planning.
- Partner with the National Sales Leader and Marketing Distribution Team to identify gaps in knowledge and provide targeted training solutions.
- Participate in Legacy IMO meetings, producer training events, and industry conferences to reinforce messaging and gather feedback.
- Conduct competitive analysis and gather field insights to ensure Legacy's training content remains relevant and differentiated.
- Collaborate with Product, Compliance, and Marketing to ensure training content is accurate, effective, and aligned with business goals.
- Contribute to the development of agendas and key messaging for Legacy-sponsored training programs and events.

**Minimum Requirements to Perform Essential Duties of the Position:**

- Minimum 5 years of experience in a training, sales, or product education role in the insurance or financial services industry.
- Life/Health Insurance licensing required.
- Strong presentation and public speaking skills with experience delivering to large and small audiences.
- Advanced understanding of fixed annuities, financial planning concepts, and the application of sales tools.
- Proven ability to translate complex product features into compelling field-ready messaging and training content.
- Excellent communication, strategic planning, and project execution skills.
- Ability to travel up to 50%

**Legacy Competencies & Cultural Expectations**

- Communication: Foster strong relationships through clear, proactive communication.
- Continuous Improvement: Continuously seek ways to elevate training effectiveness and field impact.
- Flexibility: Adapt to evolving training needs, product updates, and team objectives.
- Performance Alignment and Accountability: Align training efforts with organizational goals.
- Problem Solving and Conflict Resolution: Address training barriers and feedback to refine delivery.
- Shares Knowledge and Supports Others: Foster a culture of learning and collaboration.
- Team Member Selection and Training: Assist in onboarding and upskilling of new team members and partners. Participate in training and development