

Legacy Standard Job Description 2023

Job Title – Special Projects Sales Director

Reports to – National Sales Leader

Salary Range – \$95K to \$110K base plus project-based incentive compensation

Position Summary – Through direct and field based activities, the [Special Projects Sales Director](#) will develop and cultivate Legacy’s annual sales plan for special projects by enhancing, strengthening and maintaining relationships with key IMOs, institutional partners and producers and financial advisors.

Position will work directly with wholesalers, principals and internal marketers at IMOs, and with producers and financial advisors who can influence sales results. Develop and execute strategic sales plans to increase production from specific IMO and institutional partners, while recruiting and cultivating production from new groups.

Through virtual and in-person strategies, introduce and implement new sales and training concepts for our learning forms for our entire client base. Focus on overcoming the objections from the field and place an emphasis on positioning our product, solutions and offerings.

This position requires limited travel, with an estimation of no more than one week a month. Such travel may occur at irregular hours as needed to perform job duties. This position may be based remotely.

Essential Duties of the Position:

- Through a partnership with the National Sales Leader, develop and execute a strategy for growing business in certain key areas from key IMOs, institutional partners, producers and financial advisors to achieve the company’s overall sales goals
- Develop strong working relationships with specific carrier partners, key IMO principals, internal marketers, wholesalers to influence the recommendation of Legacy’s exclusive products. Provide training on Legacy’s products and programs and serve as a high level relationship manager and problem solver.
- Cultivate and grow relationships with principals and senior management of key IMOs that fall into these specific projects. Must be capable of communicating at the highest level of the industry and with the highest level of leadership at Legacy’s key distribution partners and carrier partners.
- Proactively generate new business opportunities – Identify and recruit new IMOs, new institutional partners, and potentially new producers and financial advisors, initiate the on-boarding process, develop and initiate a training plan and mentor internal marketers, and wholesalers on Legacy’s products or programs.
- Work as a field liaison/advocate for key IMOs and producers, identifying and overcoming problems and objections
- Responsible for establishing and maintaining relationships with key identified top producers and financial advisors
- Travel to deliver training to IMOs, institutional partners, producers, financial advisors. Attend key IMO, producers, financial advisor and industry events that have been approved by Legacy leadership, conduct IMO visits, and participate in Legacy sponsored events.

- Participate in and be a visible/proactive participant in Legacy IMO meetings, producer training events, agent training events, producer conferences and other field-facing events when identified by the National Sales Leader as relevant.
- Contribute to the overall agenda, key messages, and content of Legacy events, trainings and programs.
- Conduct and communicate market research, competitive analysis, identify market trends, and gather competitive intelligence from the field.
- Research and vet opportunities for sales programs, prospecting programs, advanced concepts, and sales tools.
- Contribute to Legacy's overall strategic business plan and success through participation at internal strategic planning meetings.

Minimum Requirements to Perform Essential Duties of the Position –

- Minimum of 5 years' experience as a sales professional, developing a strategy or plan that achieved success. Knowledge of insurance carriers, annuity distribution strategies or comparable experience as a senior leader at an IMO in the fixed annuity market
- Life/Health Insurance licensing required
- Significant experience in high level relationship management including annual sales planning experience
- Public speaking and seminar/training to large and small groups. Comfort with dynamic presentation of product, concepts, and educational content
- Advanced knowledge of financial planning concepts and wealth transfer issues, and the application of product and concepts to provide customer solutions
- Excellent business/strategic planning skills and the ability to communicate effectively verbally and in writing
- Ability to travel up to 1 week a month when needed

Legacy Essential Duties – (10%)

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- Ability 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.

Minimum Requirements to Perform Legacy Essential Duties:

1. Demonstrated ability to communicate effectively and assertively in verbal and written formats.
2. Proven ability to proactively address change, shifting priorities, deadlines and multiple demands.
3. Effectively utilize tools learned in Team Participation Skills Trainings and other trainings provided by the Human Resources Department.
4. Aligns with Legacy's Vision Values and Culture.