

Summary

Job Title

New Business Consultant II GHS & SDL

Department

GHS

The **New Business Consultant II** position is primarily responsible for making a valuable contribution to the Company's sales, team performance and marketing objectives in both SDL & GHS Departments.

Key responsibilities include new business sales & team performance development, generating lists of new and/or potential prospects, quoting/developing proposals, customer relationship management, contributing to marketing/lead generation in both SDL & GHS Sales Team Department.

Reports To: Managing Director

Key Responsibilities

RESULTS

Sales and Team Performance

40%

- Achieves goals and objectives set for customer retention, close ratios and new business volume in both SDL & GHS
- Achieves goals and objectives set for gross margins and the profitability of new business in both SDL & GHS
Provides leadership and support to other junior sales reps
Provides direction to service reps, when appropriate
- Responsible for knowing the Sales Expense policies (i.e license and certifications, training, continuing education, networking, conferences, client entertainment and meal expenses, travel...etc.) for both SDL & GHS Departments through communication with managing directors.

Customer & Prospective Contacts

15%

- Achieves goals and objectives set for number, type and frequency of customer contacts
- Maintains an accurate record of customer contacts in CRM system, including valuable notes to assist our sales process, service & renewals
- Generates accurate expense reports and generates lists of new and/or potential prospects contacts in their territory in both SDL & GHS along with the statuses of the sales process.

Quoting / Proposals	15%
<ul style="list-style-type: none"> • Delivers accurate monthly and quarterly projections for anticipated new business volume • Responds promptly to all quote opportunities and requests from customers and prospects • Consistently follows up on quotes and gathers valuable information on upcoming work and Company's competitive position 	
Customer Relationship Management	15%
<ul style="list-style-type: none"> • Effectively addresses customer questions and concerns, documents the conversations and takes appropriate action to overcome issues • Provides support for team projects and uses analysis to discover the cause and effect of specific problems as requested by management • Uses technical expertise to assist customers with meeting their budget and coverage needs at the initial submission and/or at renewal with customer calls or on-site customer meetings. • Leads customer presentations and participates in customer calls or on-site customer visits 	
Marketing / Lead Generation	15%
<ul style="list-style-type: none"> • Contributes to Company promotional and marketing activities to generate leads for our sales process • Works with Sales Manager to implement lead generation with social media, hoot suite, Linked In and other programs available through the agency 	

Total	100%
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CORE VALUES

Team Work	20%
<ul style="list-style-type: none"> • Works well with others to solve problems and reliably supports the people on their team • Contributes to an environment of free flowing communication that helps us to collaborate • Demonstrates personal accountability to co-workers by fulfilling their role on the team 	
Integrity	20%
<ul style="list-style-type: none"> • Honors commitments and accepts responsibility for their actions • Does the right thing, regardless of the situation or external pressures • Works hard to support their team members' ability to have a healthy work/life balance 	
Capable	20%
<ul style="list-style-type: none"> • Provides great service that creates customer satisfaction, referrals and long-term customer relationships • Completes work in a responsive manner to ensure our customers receive reliable and dependable services • Takes pride in their work and holds themselves to a very high standard of performance 	
Friendly	20%
<ul style="list-style-type: none"> • Provides warm, personalized service and makes clients feel like we are a part of their team • Consistently makes a little extra time to be friendly, get to know our clients and make every client feel important • Considers what might be important to each client, anticipates needs and then acts proactively 	
Creative	20%
<ul style="list-style-type: none"> • Sticks with difficult problems and keeps at them until they are solved • Shows a strong desire to learn new things and improve their professional skill set • Approaches their work with each client with an open mind, listens well and values other opinions 	

Total	100%
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Requirements

Educational and experience requirements include:

- Bachelor's degree business, marketing or in a relevant field or an equivalent amount of training
- Relevant experience in a sales or customer service role, preferably in a related industry
- Strong business development skills
- Proven ability to profitably and accurately develop quotes/proposals for new opportunities
- Above average written and oral communication skills to interact with customers, prospects and our internal team
- Proven project and customer relationship management skills
- Proven marketing skills and a demonstrated ability to generate sales leads
- Must have current & active resident state & non-resident insurance licenses