

**Position Title:** Commercial Lines Client Advisor

**Reports To:** Chief Sales Officer

**Location:** Salt Lake Office

### **Position Summary**

This is a sales-oriented position requiring advanced communication skills, a thorough knowledge of insurance products available through our agency. Capable of pursuing and closing sales of new and existing commercial lines accounts and retaining assigned book of commercial lines business.

### **Essential Duties and Responsibilities:**

- Achieve objectives established in annual Client Advisor sales plan.
- Prospect for new business from existing clients and identified target groups.
- Contact prospects for the purpose of providing a quote and making sales appointments.
- Survey prospects to determine insurance needs, inspecting current insurance policies, risk management plans, property, products and records.
- Collect detailed risk and underwriting information including survey data and loss history.
- Develop and deliver formal proposals of insurance including details of coverage's, limits, deductibles and other pertinent information.
- Work with Account management service person and/or team to market and complete company submissions and selection of potential markets.
- Conduct client and prospect appointments communicating proposals and renewals, explaining details and communicating desire to conduct business.
- Introduce Account Manager to clients and request that service calls be directed to them and forward all service related calls to assigned Account Manager.
- Stay informed of all claims or service issues and become involved in resolution when required.
- Participate in renewals, when appropriate, by reviewing expiration listing with Account Manager to determine appropriate action and collection of information to prepare renewal submissions.
- Maintain production reports and attend all sales meetings as required.
- Promote agency and insurance industry in the community.
- Keep informed of industry developments through review of trade press and by attending insurance carrier training meetings on new products, etc.
- Perform other specific duties and projects as assigned by agency management.

### **Qualifications:**

#### **Education and Experience:**

- High School diploma or equivalent required
- College degree from a four-year university, or equivalent combination of education and experience
- Experience in commercial (property and casualty) insurance with larger and more complex middle market clients and risks is preferred



## Job Description

### Licenses or Certifications:

- Active Utah Property and Casualty license required; Utah Life & Health license desired

### Required Job Knowledge and Skills:

- Proven ability to pursue and close sales.
- Ability to establish and develop strong relationships with clients, carriers, trusted business partners and coworkers
- Business development and financial evaluation skills
- Good organizational and time management skills