



[www.CompassionSociety.com](http://www.CompassionSociety.com)

## Sales Manager

### Company Overview

Compassion Society is a Louisiana-based insurance-tech intermediary start-up that develops, markets and distributes innovative 21<sup>st</sup> Century work, life balance solutions and promotes health and wellness through sustainable living. We facilitate the placement and purchase of workplace benefits, provide value added services and products to insurance companies and consumers that complement the insurance placement process.

### Summary

The **Sales Manager** will help implement the company's desired culture of salesmanship by shifting the paradigm by which insurance products are sold under the CSB Brand. The position requires regular travel and oversight of geographical territories of sales reps and broker partners; handling everything from sales to the salesmanship culture of CSB. This position will work in cooperation with underwriting and claims to focus our sales effort on business opportunities that are consistent with our underwriting and financial objectives, as well as our mission and vision statements. The Sales Manager supervises and motivates local and regional Sales Representatives in fulfillment of the corporate business appetite for underwriting quality new opportunities. The position reports to and is mentored by **the Executive Vice President of Sales**.

In this career adventure, you will also have the opportunity to participate in several other exciting business activities including: utilizing proven marketing systems, or those you may develop, to reach potential customers for our products; creating your own daily schedule, emailing and corresponding with customers; and, obtaining insurance credentials(s) and staying aware of evolving industry and product changes.

### Essential Functions

- Assists the region in exceeding premium goals in a focused, efficient and profitable manner consistent with our financial goals
- Supports agent and broker appointments with CSB
- Calls on prospective clients and generates new sales leads while also managing new and existing customer accounts.
- Makes selection decisions in the field to facilitate the quality and quantity of new business application flow
- Educates and assists internal and external customers
- Conduct market research.
- Delegates work as needed.
- Lead insurance agents and track performance.
- Create and implement business strategies and goals.
- Develops sales quotas to meet company's quarterly and annual proforma expectations.
- Minimizes company risks.
- Files reports of numbers of insurance quoted.
- Attends networking & sales events, trade shows & community events
- Creates and sustains a producer management process that prioritizes our customer focus
- Monitors and evaluates our external market for new products and processes
- Assists with the development of education and training programs for our customers, our underwriters, our loss control consultants and our claims examiners in order to improve efficiency, sales and financial results
- Completes annual producer profiles and confirms that appropriate action plans are established

- Operates in cooperation with our internal organization in developing new automated efficiencies, on-line products and improved customer communications.
- Maximizes usage of all current online systems, products and services
- Performs necessary and regular agency calls in order to maximize production efforts and to keep the producers up to date on company products and services.
- Assists in the development of the producer/underwriter relationship
- Actively prospects quality new appointments and terminates those agencies that do not meet the needs of the company
- Acts as a facilitator, trainer and problem solver in working with agencies.
- Follows-up on outstanding system issues to make sure critical concerns are properly resolved
- Travels on a regular basis
- Produces a monthly report identifying key trends in competition and individual producer information verifying the producer management process
- Develops and coordinates producer functions to facilitate production and company/producer relationships

### **Sales Marketing**

- Conducts research on work-related topics
- Tracks and maintains ledgers of reps sales commission disbursements
- Plans and executes sales presentations
- Monitors consumer or marketing trends to determine customer needs
- Trains and advises reps and brokers on CSB sales strategy
- Advises retail dealers in use of sales promotion techniques
- Analyzes market or delivery systems
- Evaluates product quality for sales activities
- Identifies best product for customer's needs
- Sells products through advertising
- Uses knowledge of sales contracts to motivate and incentivize reps and brokers
- Applies product knowledge to market goods and in public speaking techniques
- Writes persuasive sales or informational speeches

### **Salesforce Culture Infusion**

- Orients new employees and agents to the CSB way to sales and client relationships
- Conducts and attends staff meetings
- Assigns work to staff or employees
- Coordinates staff or activities in clerical support setting
- Develops and manages travel/expense budgets
- Establishes employee performance standards
- Evaluates information from employment interviews
- Evaluates performance of employees or contract personnel
- Oversees execution of organizational or program policies
- Oversees ground-level sales programs
- Provides customer service
- Resolves customer or public complaints

### **Adheres to and promotes corporate culture mandates**

- Creates a culture of success and ongoing business and goal achievement
- Promotes a healthy company culture which provides an environment that supports stronger recruiting, retention, increased customer intimacy and loyalty, greater productivity, and an increased sense of employee ownership.
- Cultivates an ethical sales culture within the company's salesforce

- Maintains and reinforces corporate culture as an important aspect of the competitive advantage for the business
- Builds a diverse organization that reflects the marketplace, lives to our values and inspires teamwork through effective leadership
- Aligns talent selection, onboarding, performance management, promotion, leader development and compensation in sync with company values and cultural expectations.

#### **Work Environment**

- Working conditions when not traveling are typical for an office environment:
- Sits for periods of time.
- Frequent use of PC and Keyboard and phone.
- Travel throughout the territory via car or air for extended periods of time

#### **Minimum Qualifications / Knowledge, Skills & Abilities**

- Bachelor's Degree strongly preferred
- Sales experience, Wholesale Insurance
- Broker Sales/Recruitment
- Voluntary Benefit Knowledge
- Territory Management Experience
- This role requires working independently and with limited direction
- A technical problem-solver with enough insurance knowledge to discuss and solve audit, collection and some underwriting problems
- Entrepreneurial spirit with a fearless and positive attitude
- Strong Presentation Skills
- Excellent communication skills both written and verbal
- Desire to continually learn new products and services
- Desire to be active in the community
- Basic computer skills
- A favorable criminal record with no felonies.

If you are interested in applying for this position, please email a cover letter, resume and salary requirements to Zakenya Neely, Executive Vice President of Operations via email at [zneely@compassionbenefits.com](mailto:zneely@compassionbenefits.com) by July 10, 2020. Please include Sales Manager in the subject line when emailing your professional resume.