

## Client Executive Sales – San Diego



**Department:** SBD Benefits  
**Reports To:** Director SBD & Programs

**Status:** Non-Exempt  
**Revision Date:** June 2011

### Summary:

Under the guidance of the Principal / Director, SBD & Programs, this position is responsible for developing new accounts and retention of existing business.

### Essential Duties and Responsibilities:

- Responsible for development of new business as agreed upon.
- Develop strong client / business relationships with the senior management of the client.
- Coordinate and execute servicing of the client within the scope of the services available within the Department.
- Provide the Principal / Director with Business Production status reports in accordance with the requests made in the quarterly review.
- Must support the maintenance of our Agency Management System.
- Must establish and maintain good file maintenance.
- Attend Departmental and Sales meetings as required.
- Establish training needs of support staff and coordinate training needs with Principal / Director. Stay involved with training as appropriate.
- All other duties as assigned.

### Education and/or Experience:

- College graduate with a minimum of five to ten years group health or benefits product sales experience through brokerage companies.
- Maintain a valid unrestricted Life and Disability License in California and meet the continuing education requirements. If involved in the sale of Long Term Care then the individual must maintain the required certification through continuing education.
- Able to work and make decisions as it relates to the clients with minimal guidance from the Department Manager.
- Must have a strong technical Employee Benefits background with an emphasis on attention to details.
- Must have strong written and verbal communication skills including excellent oral presentation skills.
- Must be willing to participate as a leader and contributor on the sales and service team.
- Familiar with the local Employee Benefits marketplace.
- Maintain a valid California driver's license and reliable transportation.
- Must have knowledge of personal computing with the ability and willingness to learn and use all computer programs as required.
- Must have the ability to operate standard office equipment- Telephone, Copier, Fax and Personal Computer.
- Must be dependable and a team player.
- Must maintain client confidentiality.
- Must have above average ability to problem-solve.

## Work Environment and Physical Demands:

- 15% - 30% travel may be required. Trips ranging from one day to one week, both in and out of state.
- Extended work hours (10 – 12 hrs/day) required on occasion to attend and participate in networking and industry functions that begin before the workday, and may extend into the evening.
- *Office environment, except during periods of travel.*