



Position Description

Position Title: Benefits Producer

Department: Sales

FLSA Status: Exempt

Supervisory Relationship: Reports to Sales & Marketing Director

Job Summary

Generates new business revenue by developing new clients that meet Exude's ideal client profile ensuring a consistent flow of new revenues to the company. Achieves annual sales targets and goals. Expected to drive benefits sales with opportunity to round out accounts with our other lines of business. Manages existing relationships to ensure high satisfaction and identifies cross-selling opportunities.

Essential Functions:

- Identifies through personal research prospects that meet Exude's ideal client profile
- Effectively uses direct outbound prospecting tools and techniques (telephone, email, social networking), seminars, networking events, etc. to make initial contact with qualified prospects
- Sets appointments and personally meets with prospects and clients, conducts in depth need dialogue to understand the full range of business challenges and opportunities.
- Pursues qualified opportunities in a manner that develops a positive business relationship built on demonstrated trust
- Identifies key client decision makers, and understands their business objectives, priorities, and concerns and converts these into addressable needs.
- Develops comprehensive solutions (consisting of product, services, technologies) that best serve and address the client/prospect's objectives and needs
- Appropriately involves/utilizes key Exude resources during the initial and ongoing pursuit of sales opportunities, including sales meetings and proposals/presentations.
- Effectively utilizes technical sales support resources.
- Updates CRM as a daily part of the lead origination and opportunity pursuit, including activities conduct, stage classification and dollar values of opportunities for pipeline reporting and sales forecasts
- Keeps current on your prospects' business issues, researches new information on prospects and maintains all such information in CRM
- Provides weekly, monthly and quarterly forecasts and closes new business within targeted timeframes
- Seamlessly transitions new accounts to the client implementation team
- Maintains an "account ownership" role for all new business sold. This should involve regular contact, visitation and planning. Depending on the size of the client a formal QBR should be considered.

- Actively participates in relevant industry associations, organizations, boards and charities, as appropriate
- Develops and maintains effective network within the business and non-profit communities
- Understands and complies with Exude's Mission and Core Values

Non-Essential Functions

- Attends relevant workshops as necessary to maintain professional knowledge and licensure
- Adheres to all applicable confidentiality and data security guidelines and ensures the appropriate handling of sensitive information
- Attends relevant staff meetings to promote communication and execution of goals
- Other duties as assigned within the scope of position expectations.

Knowledge, Skills and Abilities

- 8+ years of successful consultative sales or consulting experience in insurance brokerage industry
- Comprehensive knowledge of benefit plans and employee benefit terminology
- Proven sales aptitude with emphasis in organizational selling; track record of quota achievement
- Exhibits skill to win and retain business with C-suite executives and influence key decision-makers
- Demonstrates skills in: consultative selling and communication, building and maintaining relationships, coordinating with others, and strategic reasoning, ability to compel other to change
- Must have business acumen and a results focus
- Displays high level of motivation and ability to work well under pressure
- Self-motivated and accountable

Education

- Bachelor's degree or equivalent work experience or combination of education and experience

****Must have, or attain within 60 days of hire, a Health and Life license and must obtain a P & C License within 6 months of hire. Must complete required certification hours to maintain licensure.***

Physical Demands/Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee will frequently stand; walk; sit; use hands to finger, handle, or feel objects, tools or equipment; reach with hands and arms; balance; talk or hear.
- Must possess valid driver's license and access to insured vehicle to visit client and prospect sites
- The employee will occasionally climb stairs; stoop; kneel; crouch or crawl; taste or smell.
- The employee must occasionally lift and/or move up to 25 pounds.
- Some travel might be involved, including overnight and airline travel.
- Operate related office equipment and use necessary tools.
- Specific vision abilities required by the job include frequent reading and close vision; distance vision; color vision; peripheral vision; depth perception; and the ability to adjust focus.
- The noise level in the work environment is usually moderate.
- Work is primarily indoors but incumbent required to travel outside for meetings.



This job description does not necessarily list all the duties of the job. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This also does not represent all of the performance expectations and characteristics of individuals required to perform a job adequately. This job description is not a contract for employment, and either you or the company may terminate your employment at any time, for any reason.