



Position Description

JOB TITLE: Sales Executive
DEPARTMENT: Group
LOCATION: Headquarters-Independence, OH: Territory- (CO, AZ, UT, NV, SOCAL)
REPORTS TO: Management Team
FLSA STATUS: Exempt
DATE PREPARED: January 2020

New Position: Revision:

Position Summary: Sales Executive that is well-versed in the wholesale distribution of Group Benefits through the Broker distribution channel. The candidate should be capable of succeeding in a competitive and fast moving market that requires providing product expertise and education to Brokers/Consultants, as well as, interaction with potential customers. Growth in both sales and new brokerage relationships is material to the position and the successful candidate will be measured on the territory performance. Candidates must be able to initiate interest and sales through a multi-channel approach of telephone contacts, developing partner channels, webinars and face-to-face presentations.

MAJOR RESPONSIBILITIES:

- Identification and penetration of key brokers within the territory
- Education and relationship building with independent insurance agencies and consultants
- Manage deal flow and Requests for Proposals (RFPs) through the distribution channel to identify key opportunities within the 50-2000 employee company space
- Work within a sales team in the role as opener/closer and utilize Salesforce to achieve the individual and corporate goals
- Ability to present solutions within a variety of formats including: virtual meetings, face to face lunch and learns, finalist presentations and other public formats
- Manage the Sales process throughout the life-cycle from prospect to implementation and management of the broker relationships and expectations
- Develop expertise in all platforms and products that WIQ distributes
- Develop annual Sales goals and the strategic plan to meet those goals. Then execute the plan to achieve both individual and corporate targets
- Build and sustain positive relationships within the organization, the brokers that fall within the territory, Vendor partners and teammates

JOB REQUIREMENTS & QUALIFICATIONS:

EDUCATION & EXPERIENCE:

- College Degree Preferred
- 2 + years of wholesale group benefits sales or service and/or experience with brokers/consultants within the territory
- Experience in managing a defined territory and performance-based goals



SPECIAL SKILLS REQUIRED:

- Passion for Health and Wellness
- Excellent communication skills
- Excellent interpersonal and organization skills
- Ability to create and maintain strong relationships
- Travel required

COMPUTER SKILLS:

- Salesforce CRM experience preferred
- Proficiency in Go To Meeting, Zoom or other virtual presentation
- Proficiency in Microsoft Office - Word, Excel, Power Point, etc.

SUPERVISORY RESPONSIBILITIES: None

CERTIFICATES, LICENSES, REGISTRATION: None

PHYSICAL DEMAND: 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.

- Ability to sit at a computer for long periods of time and use a telephone frequently
- Standing, walking, talking, hearing, sitting, reaching
- Lifting up to 25 lbs. occasionally; lifting up to 10 lbs. regularly

WORKING CONDITIONS: Primarily remote office. The Candidate must provide a verified working environment at home. Periodic visits to the corporate headquarters is required as well as frequent travel within the territory.

NOTE: *The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.*

Employee's Signature

Date

Manager's Signature

Date