



Success Profile

Position Title: TITLE – CLIENT – CITY, STATE

Position Overview: The primary role of your role as a TITLE – more commonly referred to as a producer - is to generate new clients and then maintain your clientele (“book of business”). As a producer, you will sell solutions from a broad portfolio of high quality commercial property and casualty (or group benefits) insurance carriers. The best producers are superb relationship builders and become an expert consultant to business owners and C-level executives, offering trusted advice and risk management and insurance solutions that those businesses need.

You will report to NAME, TITLE. Experienced producers will be assigned as your mentors.

Position Impact: The TITLE opportunity is an expansion position to seize growth opportunities. You will play a key role in CLIENT’s organic growth strategy and will build your own commercial property & casualty (or group benefits) insurance clientele (“book of business”), and have the resources to provide your clients a comprehensive range of important risk management and insurance services. As a successful TITLE at CLIENT, you will become a major contributor in this growing company and can realistically earn \$XXX,XXX or more, once your clientele is well-established.

Position Compensation and Benefits: Exceptional training and support, a competitive starting salary up to \$XX,XXX (negotiable depending on your need and sales ability to successfully validate within 3 years), uncapped residual commissions, and an employee benefits program (including health insurance, 401K plan, and....) are provided. While the starting salary will vary depending on your need and sales ability, if you are a successful TITLE at CLIENT, you can realistically earn \$XXX,XXX or more, once your clientele is well-established.

Organization: *Insert “About Us” information from client website and/or LinkedIn Company Page.* CLIENT (WEBSITE DOMAIN), established in YEAR, has XX+ other producers and a total of XXX employees based in their office(s) in CITY, STATE.

Quick Summary of Your Year 1 in the Position:

- Complete a structured, coaching-based 6-month CIB New Producer Development Program to begin the commercial insurance producer career
- Prospect aggressively for new commercial insurance accounts
- Produce new commercial insurance clients and begin to build a book of business
- Begin to become a trusted advisor for commercial risk management and insurance in target niches/specialty markets
- Become a strong team player in the agency



Year 1 Performance Objectives:

These are the specific performance objectives *that you need to do to be successful in this position*. In assessing competency and fit, all candidates will be benchmarked against these standards. In addition, these performance objectives will be used to clarify expectations and to help onboard you as a new producer.

- 1. Complete the CIB New Producer Development Program by end of month 6**
 - Achieve state insurance license in month 1 (or pre-employment if possible)
 - Complete On-The-Job Learning Activities in month 1
 - Complete online WebCE insurance technical courses
 - Participate in individual weekly sales coaching calls with CIB sales coach
 - Shadow experienced producers
 - Create 90-day producer business and present to manager/mentor/CIB sales coach
 - Complete an Insurance Carrier New Producer School after month 6

- 2. Prepare new business prospecting plan by end of month 1**
 - Identify markets to target (niches/specialties)
 - Identify starter prospects for initial pipeline
 - Identify centers of influence, networks, associations and referral partners
 - Begin to develop a rolling list of Top 100 future ideal clients
 - Establish sales goal for year 1
 - Develop weekly activity goals to meet year 1 sales goal, e.g. make # of prospect calls to set 2-4+ initial prospect discovery meetings
 - Identify multiple methods of lead generation and sources of prospects

- 3. Implement prospecting plan to begin building a robust pipeline by end of month (1)**
 - Self-generate # prospect leads per week
 - Make # prospect phone calls per week
 - Conduct 1 meeting with centers of influence and referral partners per week
 - Set 2-4+ initial prospect discovery appointments per week
 - Harvest 1 warm lead referral per week
 - Complete weekly prospecting activity report
 - Begin to nurture and develop relationships with rolling list of Top 100 future ideal clients

- 4. Sell \$XX,XXX new commission by end of year 1**
 - Conduct 2-4+ initial prospect discovery meetings accompanied by (mentor) per week
 - Close XX% of final sales presentations
 - Close XX new accounts at \$X,XXX average commission per new account
 - Close first sale by month 5

- 5. Demonstrate understanding of the producer's role in working on the agency team**
 - Proactively meet all key agency team members, understand roles and key needs and develop approaches to maximize the total team approach to service customers



- Coordinate applications and marketing of a prospect to carriers with (inside team) by month 3
 - Coordinate building a prospect proposal with (inside team) by month 4
 - Coordinate binders and related after-sale processes for a new account with (inside team) by month 5
 - Coordinate establishing service and maintenance of a new account with (inside team) by month 6
 - Maintain agency management system requirements
 - Use (sales or CRM system) to track prospect activity and to nurture prospects
 - Develop a cross-sell opportunity for (Personal Lines, Benefits, Life) by month 9
- 6. Begin to establish expertise and relationships in target niches/specialty markets**
- Become active in trade association and/or networking groups beginning in month 6
 - Attend 1 networking or trade association event per month
 - Meet 1 time per quarter with insurance carrier representatives
 - Make 2 new connections within niche per week beginning in month 7
 - Begin solo prospecting and appointments by month 7

Position Background:

To be a good fit for the TITLE, you have:

- 3-10 years B2B sales experience – a consultative approach is a big plus BUT no insurance sales experience or insurance knowledge is required
- Easy access to the CITY, STATE office
- A network of business contacts in the CITY, STATE area and the ability and desire to build a business clientele, and retain your customers year after year
- Bachelor's degree (preferred)