

Summary

Job Title

New Business Consultant I SDL

Department

SDL

The **New Business Consultant I** position is responsible for making a valuable contribution to the Company's sales and marketing objectives.

Key responsibilities include new business development, customer contacts, quoting/developing proposals, customer relationship management, contributing to marketing/lead generation and assisting with project management.

Reports To: Sales Manager

Key Responsibilities

RESULTS

Sales Goal Performance	40%
<ul style="list-style-type: none"> • Achieves goals and objectives set for customer retention, close rates and new business volume • Achieves goals and objectives set for gross margins and the profitability of new business 	
Customer Contacts	15%
<ul style="list-style-type: none"> • Achieves goals and objectives set for number, type and frequency of customer contacts • Maintains an accurate record of customer contacts in CRM system, including valuable notes to assist our sales process • Generates accurate expense reports and lists of new and/or potential contacts in their territory 	
Quoting / Proposals	15%
<ul style="list-style-type: none"> • Delivers accurate monthly and quarterly projections for anticipated new business volume • Responds promptly to all quote opportunities and requests from customers and prospects • Consistently follows up on quotes and gathers valuable information on upcoming work and Company's competitive position 	
Customer Relationship Management	15%
<ul style="list-style-type: none"> • Effectively addresses customer questions and concerns, documents the conversations and takes appropriate action to overcome issues • Provides support for projects and uses analysis to discover the cause and effect of specific problems • Uses technical expertise to assist customers on meeting their needs for current and potential jobs 	

Marketing / Lead Generation	15%
<ul style="list-style-type: none"> • Contributes to Company promotional and marketing activities to generate leads for our sales process • Assists with customer presentations and participates with customer calls or on-site customer visits 	
Total	100%
CORE VALUES	
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Team Work	20%
<ul style="list-style-type: none"> • Works well with others to solve problems and reliably supports the people on their team • Contributes to an environment of free flowing communication that helps us to collaborate • Demonstrates personal accountability to co-workers by fulfilling their role on the team 	
Integrity	20%
<ul style="list-style-type: none"> • Honors commitments and accepts responsibility for their actions • Does the right thing, regardless of the situation or external pressures • Works hard to support their team members' ability to have a healthy work/life balance 	
Capable	20%
<ul style="list-style-type: none"> • Provides great service that creates customer satisfaction, referrals and long-term customer relationships • Completes work in a responsive manner to ensure our customers receive reliable and dependable services • Takes pride in their work and holds themselves to a very high standard of performance 	
Friendly	20%
<ul style="list-style-type: none"> • Provides warm, personalized service and makes clients feel like we are a part of their team • Consistently makes a little extra time to be friendly, get to know our clients and make every client feel important • Considers what might be important to each client, anticipates needs and then acts proactively 	
Creative	20%
<ul style="list-style-type: none"> • Sticks with difficult problems and keeps at them until they are solved • Shows a strong desire to learn new things and improve their professional skill set • Approaches their work with each client with an open mind, listens well and values other opinions 	
Total	100%

Requirements

Educational and experience requirements include:

- Bachelor's degree business, marketing or in a relevant field or an equivalent amount of training
- Relevant experience in a sales or customer service role, preferably in a related industry
- Strong business development skills
- Proven ability to profitably and accurately develop quotes/proposals for new opportunities
- Above average written and oral communication skills to interact with customers, prospects and our internal team
- Proven project and customer relationship management skills
- Proven marketing skills and a demonstrated ability to generate sales leads
- Must have current & active resident state & non-resident insurance licenses