



Example of Insurance Consultant Job Description

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Our innovative and growing company is looking for an insurance consultant. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for insurance consultant

- Proactively work with HTS-affiliated financial advisors to support their efforts incorporating the use of annuities, life insurance, long-term care insurance, and disability income insurance products into their practices
- Actively participating in scoping, leading and delivering customer consulting engagements through the whole services life-cycle
- Develop newer Group Producers is an asset, while working with established Group Advisors
- Increase external network to contribute to the community and to capitalize on business opportunities (centre of influence) and responsible to deliver on the up sell strategy within assigned territory
- Sales Consultants will focus 80% of their time on relationship management/sales generating activities, and 20% on responding to inquiries
- Handling calls (inbound and outbound), to maximise sales performance and retention targets through the provision of effective and efficient communication and negotiation skills
- Liaising with clients all year round, including but not limited to, account management, surveys & research and lead generation
- Provide the customer with relevant product information that is clear, fair and not misleading allowing them to make an informed decision
- Assists with coordinating the work load, ensuring adequate distribution of the work among available staff
- Requires broad knowledge of the Insurance industry and deep knowledge of clients' businesses and how it relates to specific Insurance segments

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- Good interpersonal, written and oral communications skills customer relations and the ability to travel, 50%-75% annually
 - Ability to build strong client and candidate relationships at all levels
 - Use problem solving skills to provide a solution that meets the adviser's needs and being able to interpret and analyse request from ABS and take appropriate actions
 - Communicate solutions via telephone or in writing to customer queries in a manner that they can easily understand and clearly explain the solution with a high degree of quality
 - Processing of administration files on but not limited to the Clas Insurance administration team systems
 - Ability to self-motivate, prioritise competing demands and manage own workload to achieve a one and done result for the customer