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Personal Lines Sales Agent – California

Description

Overview

You may not realize it, but your insurance company knows a lot more about you and your household than even your bank.

At the same time, policyholders frequently face basic problems like inadequate, redundant, or overpriced coverage.

Mission of the Personal Lines Sales Agent

The Personal Lines Sales Agent will drive revenue from prospects interested in various personal lines insurance products. This will be accomplished by proposing risk management strategies that fit within the risk profile of each customer.

The Personal Lines Sales Agent will think creatively, utilize best practices to consistently meet and exceed goals, and implement feedback to improve their sales skills and efficiency.

Trellis is a Series A technology start-up building APIs and embedded experiences that empower consumers to safely and easily access, share, and use their personal insurance information to get better-tailored, higher-quality products and services that offer maximum value.

Trellis has backing from multiple top venture capital investors, led by General Catalyst and QED Investors. Trellis is one of the fastest-growing and most profitable companies in the field of insurtech.

Responsibilities

Traits / Capabilities of the Personal Lines Sales Agent

1. Proactive
 - Demonstrates the ability to think ahead, plan long term decisions, and anticipate outcomes.
2. Comfortable with ambiguity
 - Able to adapt to an ambiguous, rapidly changing environment that does not abide by industry standards.
3. Process-oriented
 - Has the ability to quickly learn new systems and quickly implement changes to existing systems; buys into company systems and follows them by the book.
4. Interest in the insurtech field
 - Finds the use of technology in the insurance space

Employment Type

Full-time

Beginning of employment

11/25/21

Duration of employment

TBD

Sales

Job Location

Remote work from: California, USA

Working Hours

09:00-16:00

Base Salary

\$ 50000 - \$ 60000

Date posted

December 10, 2021

Valid through

06.08.2022

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- fascinating
- 5. Dependable
 - Has the ability to prioritize tasks and focus in a remote environment; a proactive communicator who addresses challenges and blockers head-on.
- 6. Empathy
 - Brings a strong sense of empathy; genuinely wants to help customers find the right solutions.

Experience

Outcomes of the Personal Lines Sales Agent

- Maintain state licensing and carrier appointments
 - 30: Be responsible and proactive in completing all tasks associated with state licensing and carrier appointments
 - 90: Quote and bind all inbound leads by being fully licensed in all states and appointed with all agency carriers
 - 365: Proactively maintain licenses and continuing education requirements
- Use agency technology and procedures to efficiently and effectively move leads through the sales funnel
 - 30: Onboard to company processes, sales systems, and carrier guidelines
 - 90: Efficiently utilize all company systems to drive production
 - 365: Collaborate with sales leadership to optimize procedures for sales efficiency
- Deliver timely, relevant responses to customer requests
 - 30: Build rapport by consistently answering all customer queries and resolving customer issues effectively.
 - 90: Proactively address customer needs, including renewals and scheduled touchpoints, with the goal of communicating with customers twice a year.
 - 365: Collaborate with sales leadership to implement new strategies for maximizing value per customer
- Achieve monthly sales quotas
 - 30: Partner with peer agents to assist in meeting company sales goals
 - 90: Independently meet company sales goals with the ability to exceed
 - 365: Consistently meet and exceed company sales goals
- Synthesize and share feedback about lead quality with product and business development
 - 30: Understand affiliate and direct-to-consumer lead traffic, including which insurance products are the best fit for Savvy's different audiences.
 - 90: Identify lead quality issues that are hindering production.
 - 365: Identify and understand patterns in lead quality; share feedback consistently by following team procedures.

Job Benefits

• What We Can Offer You

Trellis has been a remote-only company since inception and will always be remote-first. We know how to cultivate a successful and highly collaborative team despite the distance. This includes:

- Quarterly virtual events to connect with your team members while celebrating our success and accomplishments
- Budget for home office equipment.
- Clear norms and etiquette around virtual meetings.
- Semi-annual in person retreats with both work and non-work activities (once travel is safe again)

In addition to being one of the best remote companies to work for, Trellis also offers:

- A very generous time off policy with unlimited sick and personal days.
- 100% company-paid Platinum health plans for employees. Generous subsidy for dependents.
- 401(k) retirement savings plan.
- A fulfilling, high impact role on a team working to completely change the way people shop for insurance.

Contacts

Please Apply from this job posting. If you have more questions please reach out to us at We@workentropy.com