

COMMERCIAL LINES SALES ADVISOR

The Commercial Lines Sales Advisor is responsible for generating new business opportunities and managing a portfolio of commercial insurance clients. This role involves understanding client needs, providing tailored insurance solutions, and maintaining long-term relationships to ensure client satisfaction and retention. The ideal candidate is self-motivated, results-driven, and knowledgeable about commercial insurance products, underwriting guidelines, and industry regulations.

Key Responsibilities:

Prospect, identify, and generate new business opportunities through cold calling, networking, referrals, and lead generation tools.

Develop customized insurance solutions for commercial clients across various industries.

Conduct risk assessments and coverage analysis to recommend appropriate insurance products.

Prepare and present proposals, quotes, and coverage comparisons to potential and existing clients.

Maintain strong relationships with insurance carriers to negotiate coverage terms and pricing.

Manage a portfolio of clients to ensure high retention rates and cross-sell opportunities.

Stay up to date on market trends, product offerings, underwriting criteria, and regulatory changes.

Achieve and exceed sales targets, KPIs, and performance metrics set by management.

Collaborate with internal teams such as account managers, underwriters, and customer service representatives to ensure smooth onboarding and servicing.

Maintain accurate records in CRM systems and adhere to compliance and documentation standards.

Qualifications:

High school diploma or equivalent required; Bachelor's degree in Business, Insurance, Finance, or related field preferred.

Valid insurance license for commercial property and casualty (or willingness to obtain).

Minimum [2-5] years of experience in commercial insurance sales or a related field.

Strong knowledge of commercial insurance products including general liability, property, workers' compensation, commercial auto, professional liability, etc.

Proven track record of meeting or exceeding sales goals.

Excellent communication, negotiation, and interpersonal skills.

Highly organized, self-motivated, and able to manage multiple priorities.

Proficiency in Microsoft Office and experience with CRM and agency management systems.

Apply by reaching out to Farmers Union Agency today!

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