

**JOB TITLE:** Benefit Advisor  
**REPORTS TO:** Vice President  
**FLSA STATUS:** Exempt

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## **POSITION:**

**Benefit Advisor**

## **SUMMARY**

The position is responsible to build a book of business through new business sales from lead generation thru close. The objective is attained by developing significant new business clients, building relationships with potential and network resources and collaborating with our SSG associates. The focus of this role is to target companies with one or two levels of decision-making authority thru a typical sales cycle of six months to one year. This is a high growth potential position with the individual expectation to increase industry knowledge and business acumen. Revenue generation and client satisfaction is achieved by working with support teams in line with SSG's vision and values.

## **ESSENTIAL DUTIES AND RESPONSIBILITIES**

### **Develop business and high-level contact relationships with target prospects.**

- Identify targets and create target list of Top 100 prospects.
- Develop at least 2 leadership roles in the region and community.
- Identify all decision makers in the sales process and bring in Senior Producers/Management where appropriate.
- Utilize personal contact with both clients and prospects to ensure client satisfaction and company goals are met.

### **Penetrate prospect targets to generate proposals and close sales.**

- Discover needs by utilizing consultation selling approach.
- Collaborate with the Account Management team to facilitate the solution development.
- Prepare proposals and prospect presentations, including fee estimates.
- Utilize strong communication and closing skills to present solutions and secure new business.
- Understand your value proposition and how to manage a prospect budget to close profitable sales.
- Plan regular seminars and education opportunities for clients and prospects, including, coordination with marketing, and ensuring maximum attendance.

### **Identify market trends to provide input into SSG's overall marketing strategy.**

- Help identify new product and service opportunities in SSG's market.
- Attend appropriate conferences and networking events and report key learnings.
- Maintain awareness of market conditions and competitor's products and pricing.

### **Utilize strong time management and organizational skills.**

- Self-starter
- Prioritize and follow through on issues.
- Successfully forecast sales and pipeline.
- Create, implement and achieve territory and account plans.
- Maintain and update database tool daily.
- Present progress weekly, monthly, quarterly and update annually.
- Set and achieve monthly, quarterly and annual goals.
- Attend networking events and annual conferences representing SSG.

### **Manage client book of business**

- Remain as key strategist lead to client and maintain SSG relationship
- Manage relationship at highest level with client leadership
- Retain clients thru ongoing relationship management
- Lead and work with assigned SSG Team

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### **Additional Responsibilities**

- Lead, guide, direct mid-year and annual renewal meetings.
- Work with the Account Manager assigned to client.
- Assist Account Managers and Service Representatives with escalated issues when needed.
- Maintain Database and CRM system.
- Attend all scheduled team and staff meetings.
- Attend educational and product seminars.
- Participate in special projects as required.
- Other duties as assigned.

### **Measurement**

- Prospect development
- (Attain, Reach, Achieve) individual sales goal.
- Maintain a consistently robust pipeline of new business.
- Fulfill all KPI requirements (sales goal, pipeline, appointments, calls)
- Maintain 95% retention on book of business.

### **SUPERVISORY RESPONSIBILITIES**

This position has no supervisory responsibilities.

### **COMPETENCIES**

To perform the job successfully, an individual should demonstrate the following competencies:

**Client/Quality Focus** – Anticipate, monitor and meet the needs of clients, and respond to them in an appropriate manner. Demonstrate a personal commitment to identify clients' business needs and continually seek to provide a trusted advisor level of service.

**Adaptability** – Adjust scheduled work to accommodate an ever-changing environment. Triage the multiple demands and competing priorities by gathering relevant information and applying critical thinking skills. Seek wisdom and insight from SSG team members when needed.

**Teamwork** - Balance team and individual responsibilities; Exhibit objectivity and openness to others' views; Give and welcome feedback; Contribute to building a positive team spirit; Put success of team above own interests; Supports everyone's efforts to succeed.

**Communication** – Communicate clearly and effectively both verbally and in writing; Able to read and interpret written information; Speak clearly and persuasively in all situations; Listen and obtain clarification thru strong inquiry skills; Respond clearly to questions; Share information and creative ideas with others; Participates in meetings.

**Dependability** - Follow instructions, respond to management direction; Take responsibility for own actions; Keep commitments; Commit to long and flexible hours of work when necessary to reach goals.; Complete tasks on time or notify appropriate person with an alternate plan; Work independently, accept accountability and responsibility, adapt to change, set high personal standards, remain focused under pressure, meet attendance/punctuality requirements.

### **QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty at a high level. The requirements listed below are representative of the knowledge, skill, and/or ability required.

#### **Education and/or Experience**

- 1–2 years in Business Development/Sales role within a business-to-business environment, and 2-3 years of industry experience a plus.
- Prefer 4-year degree or equivalent experience. specific area of focus – *e.g., Business, Marketing, Insurance, Sales, etc.*
- Active Life and Health License or obtain within 90 days of employment.

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### **Time Management Skills**

- Ability to organize and manage multiple competing priorities.
- Work well under pressure with deadlines.

### **Work Skills**

- Highly skilled in communication – both written and verbal.
- Highly skilled with people and data: negotiating, persuading, communicating, analyzing, evaluation, imputing, reporting and synthesizing data.
- Act independently yet can work in a team environment.
- Adapt quickly to new technologies and products.
- Demonstrate consultative selling skills and understands value-based selling.
- Develop strong business acumen and ability to sell at the C Suite level.
- Skilled in performing sales tasks: cold calls, networking -both in person and virtually.
- Experience in using various professional social media platforms

### **Computer Skills**

- MS Office Suite
- Experience working with PowerPoint
- Sales CRM
- Lead generation system
- Account Management CRM system
- Office Equipment – Fax, Copier, Scanner, Printer, Cell Phone

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this Job, the employee is regularly required to sit; use hands to type as well as talk and hear. The employee occasionally stands and walks. The employee must occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision and ability to focus on computer screen and paperwork. Employee is required to travel to and from prospect and client locations. Must provide own transportation and valid driver's license is required.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of a normal office environment. The noise level in the work environment is usually moderate to low.

### **TRAVEL**

Overnight travel will be required for networking events, conferences, and training purposes.

**SUBMIT RESUME / PORTFOLIO**