

Job Title: Insurance Sales Executive**Location:** Pune**Job Type:** Full-time - Office and Field**Reports To:** Head of Insurance Practice

Job Overview:

We are seeking a dynamic and results-driven Insurance Sales Executive to join our team. This role focuses on identifying and securing new business opportunities for our Insurance business. The ideal candidate will possess excellent communication skills, a good understanding of Insurance concepts, and a passion for finding opportunities with prospective clients fitting our target segment profile. This position will be important in expanding our client base and supporting the overall business development strategy.

Key Responsibilities:

- **Insurance Sales:** Proactively identify, qualify, nurture Insurance sales opportunities. Position relevant Insurance solution by explaining the products in detail to existing and potential Clients. Assist Clients with documentation for closing the Insurance sale. Utilize various tools and platforms (CRM, social media platforms) to build a strong pipeline of prospects.
- **Client Engagement:** Engage with existing and potential clients via outbound calls to understand their requirements. Hand hold the client during the entire sales cycle till the policy is issued.
- **Post Sales:** Provide post-sales support to clients for queries and claims in collaboration with the backend team. Review client's current policies and suggest changes or additions.
- **Marketing:** Coordinate with the marketing agency to execute targeted campaigns and follow up on inbound leads
- **CRM & Reporting:** Maintain accurate records of all interactions with prospects and clients in the CRM system. Generate reports on deal progression till closure for MIS.
- **Renewals:** Manage timely execution of Insurance renewals and related service.
- **Market Research & Analysis:** Stay up-to-date with trends in the Insurance investment products market, including emerging products, competitor offerings, and industry regulations. Provide valuable insights to the team and contribute to the development of Business Development strategies.
- **KPIs:** Work towards meeting or exceeding monthly, quarterly, and annual pipeline targets. Continuously monitor performance and take proactive steps to ensure goals are achieved.

Qualifications:

- **Education:** Bachelor's degree in Business, Marketing, or a related field is preferred.
- **Experience:** 3+ years of **Sales experience** in Insurance and a track record of consistently hitting targets.
- **Knowledge:** Strong understanding of Insurance products and concepts.

Skills:

- Excellent verbal and written communication skills, with the ability to build rapport and trust with prospective clients.
- Strong Listening and Collaboration skills.
- Ability to manage multiple leads from multiple sources simultaneously in a fast-paced environment.
- Proficiency with CRM software (e.g., Salesforce, HubSpot) and Microsoft Office Suite.

Personal Attributes:

- Self-motivated, results-oriented, and goal-driven.
- Strong problem-solving abilities and attention to detail.
- Ability to work independently as well as part of a team.
- Enthusiastic, confident, and professional.

Key Performance Indicators (KPIs):

- Number of Insurance policies issued per month.
- Number of Sales calls scheduled per week.
- Sales Conversion rate per month.
- No. of leads managed per week.
- Renewal success rate in a month.
- Engagement for renewals in a month.
- Service quality for claims and queries.

Why Join Us:

- **Growth Opportunities:** We offer a dynamic and supportive work environment with ample opportunities for career advancement within the company and industry.
- **Competitive Compensation:** Attractive salary and performance-based incentives.
- **Professional Development:** Ongoing training and development opportunities to enhance your skills and knowledge of financial products.
- **Company Culture:** Be part of a collaborative and innovative team that values integrity, discipline, and hard work.
- **Office Location:** In the heart of Pune with world-class facilities and a 50-meter walk from Metro Station.

- **Work / Life Balance:** Our working hours are fixed from 9 am to 5:30 pm, with reduced hours on Saturdays and you will be entitled to 20+ days of official leave in a calendar year.

To Apply: Please submit your resume and a cover letter outlining your qualifications and interest in the role to talent@everguardlife.in