

McGrath Insurance Group
Personal Lines Sales

About The Agency: McGrath Insurance Group is an independent, privately held, insurance and benefits brokerage. We have been working side-by-side with clients since 1945. We work as a team to provide protection and service to our clients, their businesses, their families, and their assets. Our clients come to us because they want uncompromising quality and that is what we strive to give each of them every day. Our agency is a dynamic, solutions based industry innovator with a strong family culture that values every employee, customer, and vendor.

Job Description: Do you like sales but need a change from your current job? Do you have a successful sales track record? Pride yourself on winning and wowing customers? Enjoy building relationships? Manage your time well? If so, then we want to talk to you!

McGrath Insurance Group needs a Personal Lines Insurance Inside Sales Manager to join the team. If you have the right attitude and motivation, we will teach you insurance. The position offers the right candidate an exciting opportunity to grow a personal book of business building a residual income stream. The successful candidate will be responsible for maintaining and maximizing profitable relationships with current clients and growing the book of business through new client sales.

The ideal candidate will have a solid foundation in sales/account management and will interact daily with prospects, clients, insurance carriers, and fellow employees while conducting specific sales and marketing activities. The candidate must also have excellent organizational, communication, and decision making skills.

The position offers a base salary plus commission.

The candidate must:

- Identify, qualify, and develop personal lines insurance opportunities with new and existing clients in person, on-line, by phone, and through written communication
- Respond to incoming inquiries (phone, online, walk in) and gather all necessary information on quote sheet
- Network and prospect for new clients including win backs
- Actively prospect, round accounts, and solicit increases in existing client coverage
- Obtain best coverage/rate for new insured, process quotes, and bind insurance coverage; follow up as necessary with inspection, photos, and other documentation
- Present policies to insured and educate them on coverages and rates
- Foster and maintain excellent relationships with prospects through regular follow up, timely quotations, and general account support
- Monitor, review and report on key metrics to ensure sales targets are achieved and execute sales activity documentation in a timely and professional manner.



- Collaborate with team members, participate in agency marketing activities, meet/network with carriers and vendors, and attend agency functions
- Stay current on industry changes and maintain CE
- Display a positive, helpful attitude to help create a friendly environment for clients and co-workers

Requirements: The candidate will:

- Demonstrate the aptitude for and willingness to prepare and pass the insurance licensing exam required by your state
- Have a minimum of 2 years sales/account management experience with a high customer retention rate
- Have a proven track record of sales success; consumer sales experience helpful
- Possess strong presentation, persuasion, and negotiation skills with the ability to close sales
- Be people-oriented, client focused, and professionally assertive in developing new client relationships and servicing existing clients
- Possess outstanding organizational skills with an ability to complete difficult assignments without supervision
- Demonstrate sound business judgment, strong decision making, superior written and verbal communication skills
- Have excellent time management skills with a personal accountability mindset
- Thrive in a team environment and be a positive team player
- Have proficiency in the use of computers and other technology including use of a customer information management system

