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# JOB DESCRIPTION

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**Job Title:** New Business Fulfillment Executive

**Location:** Walnut Creek, California

Our sales team is seeking a results-driven, interpersonal-savvy New Business Fulfillment Executive to support the growth of our sales initiatives. This is an inside sales role where referrals and leads are provided. There are no cold calling or lead generating activities; this position entails purely placing leads that we generate. The individual will be responsible for new business placement, coverage recommendations, pricing negotiations, and troubleshooting client situations. He or she will also be responsible for analyzing and assessing complex coverage issues.

## Responsibilities Include

Placing new business and performing limited account management duties with an emphasis in the Small Business sector.

- Production of new business, including:
  - Online and phone quoting
  - Policy detailing in agency management system
  - Marketing of new business submissions and follow-up
  - Inputting client notes, underwriting information, attaching client documents, etc.
  - Collecting any agency due premiums on new business placed
  - Attendance at monthly sales meetings
  - Completing special projects as assigned

## Qualifications

- 3+ years of commercial insurance related experience
- Active Property & Casualty license required
- Proficiency with core commercial insurance coverages
- Must be able to demonstrate a high level of proficiency with carrier online platforms
- Demonstrated ability to communicate effectively and professionally with clients and internal staff
- Demonstrate a sense of urgency, initiative, responsiveness, and attention to detail
- Must be able to maintain the highest level of confidentiality
- Proven ability to handle multiple tasks simultaneously, exceptional organizational skills, and the ability to meet designated deadlines are required
- Exhibit a high level of energy and teamwork orientation

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Signature

Date