
JOB DESCRIPTION

Job Title: Sales Assistant

Branch Location: Walnut Creek, California

SelectSolutions is a rapidly-growing insurance brokerage and we are currently seeking an assistant to support the sales team in the production of new business. The Sales Assistant will perform a variety of sales and administrative duties in a fast-paced environment.

Responsibilities Include

- Answering incoming sales calls
- Inputting new prospect information into data management system
- Preparing and sending submissions to insurance companies
- Following up with underwriters to determine status of quotes
- Calling insurance company underwriters to verify risk acceptability
- Quoting/rating support on insurance carrier websites
- Making outbound calls to follow up on outstanding information/prospect interest
- Setting up proposals for executive review
- Performing various other tasks as assigned by Fulfillment or Service Managers

Required Skills

- Must be able to thrive in a fast-paced environment
- Must be able to deal with a high volume of incoming calls
- Must be able to make a high volume of outbound calls
- Must be detail oriented and self-motivated
- Must be able to adapt to change and meet demanding turnaround times
- Must be able to work with and adapt to motivated salespersons with varying personality types
- Must be able to take meticulous notes while actively listening to prospective clients' needs

Qualifications

- Adept with both computer and phone systems, including multiline phones
- Excellent customer service skills
- Able to speak articulately and professionally, with top notch phone etiquette
- Proficient with Microsoft Windows
- Candidates with a background in customer service are strongly encouraged to apply
- Candidates who are English/Spanish bilingual are strongly encouraged to apply

Education

- College degree is desired
- Fire and Casualty license is desired

Signature

Date

