1. Recommended type and amount of coverage based on analysis of customers' circumstances using persuasive sales techniques.
2. Sought out new clients and developed client relationships through networking, direct referrals, lead databases and cold calling.
3. Handled approximately [Number] outbound and inbound sales-related calls per week to qualify individuals interested in purchasing insurance coverage.
4. Customized existing insurance programs to suit individual client needs by analyzing specific requirements.
5. Analyzed retention, loss ratio trends and sales volume to identify areas for improvement.
6. Sold auto, home, life and other various insurance products to individuals and affinity groups within assigned territory using consultative selling techniques.
7. Established payment methods for [Number] clients to facilitate customer payments and issue receipts.
8. Reviewed policy applications for errors and liaised with underwriters to facilitate quick completion of application process.
9. Conducted research on insurance packages and investment options to generate client recommendations.
10. Quoted and calculated premium rates for policies, using rate book, [Software] and calculator.
11. Directed [Number] employees and preferred partners to facilitate sales and renewals of stop-loss products.
12. Determined financial needs by assessing existing coverage and aligning new products and services with long-term goals.
13. Explained advantages, features and disadvantages of various policies to promote sale of plans, boosting overall sales [Number]%.
14. Created sources for continuous client referrals within community and with businesses using [Skill] and [Skill].
15. Utilized direct marketing strategies such as mailings and phone contracts to approach potential clients and increase sales by [Number]%.
16. Supported [Number] underwriters with customer accounts valued around $[Amount], using [Skill] and [Area of expertise].
17. Presented financial well-being education to groups of over [Number] people to cultivate new business and increase financial knowledge of customer base.
18. Built relationships with clients through active listening and [Skill] talents to provide excellent service.
19. Organized racks and shelves to maintain store visual appeal, engage customers and promote specific merchandise.
20. Scheduled fact-finding appointments and consultations to determine client needs and overall financial situations.