



Insurance Sales Representative (Account Representative/Account Executive)

With over 10,000 clients, Trade Risk Guaranty (TRG) is the industry leader in the consumer-direct U.S. customs bond and marine cargo insurance markets. The Account Representative position is a springboard into our sales department. As a new member of TRG's sales team, your first three months will be spent working alongside our most experienced trade professionals learning the ins-and-outs of our niche insurance products. During this period, TRG sends its best and brightest to insurance school to obtain a resident producer license in Property, Casualty and Surety. Successfully acquire your license to earn a promotion to Account Executive; TRG's uncapped commission sales position.

Whether you are a veteran sales professional with extensive experience or a recent graduate, TRG offers you the opportunity of a premier sales career with unlimited earning potential in the picturesque mountain town of Bozeman Montana. Don't settle for living in a big city; enjoy personal and professional success by joining TRG's sales team. Revel in our open concept downtown office and all of the treasures that southwest Montana offers.

Responsibilities:

- Generate and pass qualified insurance leads (Account Representative)
- Close new business leads by applying persuasive and sound sales techniques (Account Executive)
- Adjust content and approach of communication to individual prospect needs
- Stay up-to-date on competition, pricing, products and sales techniques
- Educate prospects and clients on features and benefits of TRG products
- Recommend products based on prospect needs
- Utilize advanced cross-selling techniques

Requirements:

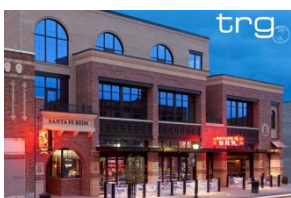
- Ability to secure a resident Montana Property, Casualty and Surety license. This license is not a prerequisite of the position. TRG offers assistance in obtaining said license
- Ability to multi-task in a fast-paced, team sales environment
- Above average proficiency in learning and utilizing new computer software programs
- Extraordinary written and verbal communication skills
- Ability to cultivate and assertively close leads

Benefits:

- Hundreds-of-thousands of high-quality leads
- TRG Best Shot Sales Training Program
- Inside sales, no traveling
- Competitive wage structure
 - \$15.38/hour as an Account Representative
 - Uncapped commission with a \$2500/month guaranteed draw as an Account Executive
 - Average Account Executive compensation range of:
 - \$35,000 to \$65,000 1st year
 - \$50,000 to \$75,000 2nd year
 - \$75,000 to \$100,000+ 3rd year and beyond
- Growing company with room for advancement
- Group Health, Dental and Vision plans
- Company sponsored 401(k) plan
- Casual dress code
- Personal Time Off, 10 day accrual schedule in your first year plus 8 paid company holidays
- Banker's hours, Monday through Friday, 8:00am to 4:30pm Mountain with an hour lunch
- Montana Living; Blue-river fly-fishing rivers, world class skiing, hiking, hunting, climbing, boating, biking, camping, swimming, soaking, drinking, eating and more!

Qualifications:

- Self-motivated and competitive
- Team player with excellent interpersonal skills
- High level of integrity
- Previous sales experience preferred but not required
- Multi-lingual preferred but not required



Trade Risk Guaranty (TRG) is an international trade insurance agency headquartered in Bozeman Montana. Our consumer-direct approach has grown our company to include more than 10,000 clients and 50 employees. We offer careers in sales, marketing, customer service, office administrations, information technology and insurance underwriting.

Locate your career and apply online at www.traderiskguaranty.com/careers.aspx

Job Description

Revision Date: 12/16/14

Author: Tyler Zaichkin/Teri Nightingale

Position Status: Full Time Part Time Exempt Nonexempt

Position Title: Account Representative

Department: Sales

Immediate Supervisor: Lead Development Manager, District Sales Manager

Positions Supervised: n/a

Position Description:

Generating and passing new business leads for the sales team, ensuring continued growth for TRG

Major Areas of Responsibility:

60% - Business lead development communication
40% - Administrative duties supporting lead development

Specific Responsibilities:

- Extensive telephone contact with international trade businesses: cold calling prospective clients to introduce TRG's products and communicate TRG benefits; acquiring essential lead information for sales team follow-up; responding immediately to prospective client requests
- Regularly reaching and/or exceed Individual Goals: Minimum 200 calls/week; minimum 3 Employer ID Number (EIN) and 1 non-EIN leads/week passed to sales team
- E-mail: Send and reply to frequent messages accurately and in a timely manner (avg 15 - 30/day)
- Utilize database and internet tools to prospect for good leads
- Communication with sales team: Pass accurate, complete, and timely lead information to Senior Account Executives
- Data entry: Accurately update/maintain TRG's Client database

Specific Responsibilities (Continued):

- Team interaction: Participate in the training of new Account Representatives; participate in peer to peer team building; promote and regularly use TRGBlog.com
- Perform all duties in a safe manner, in accordance with TRG's Safety Program

Required Knowledge, Skills, and Abilities:

- Strong communication skills; ability to communicate clearly and effectively by e-mail, telephone, and in person
- Ability to consistently provide exceptional customer service to potential clients
- Ability to consistently contribute positively as a team member
- Ability to be very detail-oriented and successfully multi-task
- Ability to quickly become knowledgeable about TRG products
- Ability to be self-motivated to reach and exceed goals
- Ability to take initiative and be accountable for work: take ownership for quality and timeliness of work, and be self-motivated to follow through as needed
- High level of comfort and competency using standard PC and basic software programs, including Outlook e-mail
- Must be able to secure MT Insurance Producer Property & Casualty and Surety license within 90 days of starting

Education and Experience:

Preferred:
Bachelor's degree or equivalent combination of experience/training

Multi-lingual ability very helpful

Physical Demands:

Primarily a sedentary position; extensive time using telephone, and data entry into SLX database system, so ability to see computer screen, hear and communicate on telephone, and hand/wrist dexterity to use computer keyboard; mobility to meet with sales team members, and/or with other staff in office

Work Environment:

Based in Bozeman office, which has an open floor plan with group work stations. Position is regularly scheduled for 37.5 work hours each week, and work hours in excess of that are not allowed for this non-exempt position without advance approval by management.

This job description outlines the major requirements for this position, but is not designed to cover all possible work situations, or contain a comprehensive listing of all activities, duties, or responsibilities that are required of the employee. Other duties as required may be assigned by management.

Department Manager:

Tyler Zaichkin

Human Resources:

Teri Nightingale

Senior Management:

John Michel

Employee Name (Print): _____

Employee Signature: _____

Date: _____

Job Description

Revision Date: August 27, 2014

Author: Tyler Zaichkin/Teri Nightingale

Position Status: Full Time Part Time Exempt Nonexempt

Position Title: Account Executive

Department: Sales

Immediate Supervisor: District Sales Manager

Positions Supervised: n/a

Position Description:

Generating new business leads and closing sales as part of TRG sales team

Major Areas of Responsibility:

70% - Business lead development and sales
30% - Administrative duties (to support lead development)

Specific Responsibilities:

- Extensive telephone and e-mail communication with international trade businesses: cold calling and follow up with leads; developing relationships; responding immediately to prospective client requests; utilize SLX database and internet tools to prospect/sell
- Assess client service needs and suggest and close sales of TRG products (customs bond and cargo insurance); cross-selling TBIB products (ISF online self-filing, filing service, entry online self filing, customs brokerage services, freight forwarding services)
- Regularly reach and/or exceed Individual Goals: Minimum 200 calls/week; minimum 8 bond queries/week; minimum \$3,500 in monthly revenue
- E-mail: Send and reply to frequent messages accurately and in a timely manner (avg. 15 - 30/day)
- Communication with sales team: provide regular feedback to team
- Administrative duties: Preparing required documents for CES; accurately updating and maintaining TRG's client database

Specific Responsibilities (Continued):

- Team interaction: Participate in the training of junior team members; participate in peer to peer team building; promote and regularly use TRGBlog.com
- Mentoring: Provide mentoring to junior team members; actively seek out opportunities to expand own job knowledge and skills
- Perform all duties in a safe manner, in accordance with TRG's Safety Program

Required Knowledge, Skills, and Abilities:

- Strong communication skills; ability to communicate clearly and effectively by e-mail, telephone, and in person
- Demonstrated ability to consistently provide exceptional customer service to clients and potential clients
- Demonstrated ability to effectively develop leads and close sales consistently
- Demonstrated ability to take initiative and accountability for work: be self-directed to troubleshoot to research and resolve issues; work pro-actively to anticipate needs and become more effective; follow through as needed without direction, taking personal responsibility for quality of work and timeliness
- Demonstrated ability to consistently contribute positively as a team member; assist team members in becoming successful themselves
- Demonstrated ability to be very detail-oriented and successfully multi-task
- Knowledge of and high level of comfort promoting TRG products
- Demonstrated ability to be self-motivated with a drive to exceed goals
- Must be willing to grow with training, and be able to learn and implement new processes when they occur
- High level of comfort and competency using standard PC and basic software programs, including Outlook e-mail

Education and Experience:

Required:
MT Insurance Producer Property & Casualty and Surety license
Bachelor's degree or equivalent combination of experience/training
Preferred:
Familiarity with TRG processes and products
Multi-lingual ability very helpful

Physical Demands:

Primarily a sedentary position; extensive time using telephone, and data entry into SLX database system, so ability to see computer screen, hear and communicate on telephone, and hand/wrist dexterity to use computer keyboard; mobility to meet with sales team members, and/or with other staff in office.

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Senior Management:

John Michel

Employee Name (Print): _____

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Date: _____