

JOB DESCRIPTION

Job Title: Sales and Outreach Assistant

Create, develop and promote current and new events or programs to further the growth of the organization. Works closely with our internal sales team, current membership and independent life insurance agents, educating them on 1891 Financial Life products and benefits that add value to both agents and members. Supports marketing efforts to communicate the value of membership, assists in promoting products and services, encouraging member engagement, and to aid in public affairs efforts. Coordinates support services for 1891 Financial Life's current Court/Impact Team events.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE, BUT ARE NOT LIMITED TO:

- Engage and enroll in the mission, vision of organization, and have a deep knowledge of agent and member benefits to promote to all.
- Organize, develop and support outreach events and other member programs.
- Work with established court/impact teams to develop membership drives annually.
- Create and develop new annual membership programs and events for Territory Directors.
- Develop new relationships with our Internal Wholesale team, our Independent Agents workforce, and new our membership.
- Develop relationships with Illinois, Indiana and Wisconsin Catholic schools and parishes to increase awareness and promote membership.
- Annually review agent and member benefits and events with Sales team.
- Meet KPI's established and provide a summary of weekly activities to manager.
- Assist with the shooting of short video and take photos at agent and membership events.
- Produce and gather content for monthly member magazine and newsletter for social media.
- Maintain Salesforce agent and membership platform by tracking all calls from our agents and members.
- Help with the onboarding of new independent agents by developing an efficient onboarding process.
- Work with CEO to develop new relationships with churches, organizations of faith and associations.
- Update and maintain daily communication with sales team and CEO.
- Reconcile weekly commission payments with Internal Sales Manage.
- Prepare, maintain, and update Salesforce Reports - for example: Weekly Business Submitted, Weekly Business Issued.
- Track Agent Production Contest Results (short and long term).

EDUCATION AND/OR EXPERIENCE:

- Bachelor's degree in marketing, communication or public relations, business-related field from an accredited university.
- 3 years of life insurance sales with license.
- Complete understanding of basic life insurance products and annuities.
- CRM Salesforce knowledge, Microsoft Office and Excel spreadsheet analysis a must.
- Community service relationship development experience.
- Strong verbal and written communications skills.
- Strong marketing, fundraising and event development background.
- Requires experience in special events management, promotion, communications, information dissemination techniques and methods.
- Ability to travel weekdays and weekends when necessary.
- Bilingual – Spanish, Polish, Hmong, Czechoslovakian, or any other language a plus.