

Job Title: Field Sales Manager
Department: Sales Department
Reports To: CEO
FLSA Status: Exempt
Date: August 1, 2025

Summary

The Field Sales Manager will work very closely with the CEO to recruit, onboard, support, and retain new IMO and large independent general agencies. This role will be the primary external onboarding IMO's and large agencies partners, sales and new business departments to build relationships and to ensure a positive experience. This role requires an advanced knowledge of life insurance and annuity products, as well as familiarity in sales and marketing strategies used in the life insurance industry.

Essential Duties and Responsibilities include the following:

(Other duties may be assigned.)

- Prospects for new IMO's and Large agencies through leads, telephone calls, networking events, trade shows and sales lead groups
- Looks for business development opportunities for all product lines
- Provides sales presentations to IMO's/Large Agencies in person, phone or video conference
- Fully understand all products and benefit services the society currently offers
- Tracks all calls daily into CRM system salesforce
- Meets sales and retention goals on a quarterly basis, if not provide next steps to obtain goals
- Grows long-term relationships for the organization to drive revenue.
- Ability to provide guidance on products to IMO's independent producers
- Gathers feedback from existing producers to drive the development of new products
- Schedules monthly reviews with IMO/Agencies
- Collaborates with new business, customer care, marketing and outreach and engagement departments

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Supervisory Responsibilities

None

Education and/or Experience

- Licensed Life insurance Agent
- Associate degree, Bachelor's degree preferred
- Minimum of 7 years insurance sales experience
- Ability to gather and summarize data for reports.

- Demonstrated ability to handle multiple projects and details simultaneously
- Ability to find solutions to various administrative problems
- Ability to prioritize work within compressed times.
- Innovative with medium stress tolerance and decision-making skills.

Communication Skills

Ability to read, analyze and sales reports, contracts, certificates and legal documents. Ability to respond to common inquiries or complaints from agents or members. Ability to communicate and articulate clearly at events or in a public forum.

Mathematical Skills

Ability to calculate simple math figures and amounts such as discounts, interest, and percentages.

Reasoning Ability

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Computer Skills

To perform this job successfully, an individual should have knowledge of Word Processing software and Spreadsheet software. Knowledge of salesforce is a plus.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear.
- Employee may occasionally be required to lift and/or move up to 15 lbs.
- Travel is expected for this position.
- Specific vision abilities required by this job include close vision and distance vision.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is in a typical office environment.
- The noise level in the work environment is usually moderate.

Employee Signature: _____ Date: _____