

# ***JOB DESCRIPTION***

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**Position Title:**      Sales Director                      **Industry:**              Life Insurance  
**Reports To:**              Managing Partner                      **Salary Range:**              Sr. Level Competitive

## **Company Overview:**

LifeTrends®, a dynamic organization which specializes in providing competitive intelligence for Life Insurance companies and select Insurance Marketing Organizations, is seeking a skilled, energetic sales and distribution professional to join their growing team in Austin, TX.

## **Position Summary:**

The Sales Director's key responsibility is to bring the LifeTrends offering into the open market, increasing visibility and sales. To present our company in a positive light and believe in the value that we offer. Relationships need to be genuine and respected. This person will have total ownership of all things Sales related, will define marketing sales opportunities, assist with creating sales marketing messaging and work with Marketing Lead to create marketing goals and initiatives to build a marketing strategy for all sales. This person will play a key role on the LifeTrends® team and will be asked to significantly contribute to the growth and direction of our organization.

## **Essential Job Functions:**

- Efficiently grow our business. Determine the most efficient way to increase sales through the many different avenues and tactics available, if they flow through the ideals outlined in the purpose of the role. A growth plan should be in place within the first 3 months with an evaluation of effectiveness within the first 6 month.
- Build a sales strategy to deliver (sell) our product to carriers, brokerage general agencies and any other sales related markets that are determined viable by LifeTrends. Plan should support growth revenue goals.
- Evaluate and pivot. Within the first 9 months, we expect a second sales plan to be in place. This can be a different tactic on the same product, or a new idea generated through experience.
- Identify business opportunities by identifying prospects; research and analyze options.
- Work with key contacts and networks to identify potential clients that align to LifeTrends client profile. Work together with analysts and account managers to identify key topics to "sell" to clients for presentation deliverables.
- Define, build and implement a sales strategy. Create and own the direction for supporting our strategic distribution partners and their member brokerage general agencies. Create strategy around how LifeTrends® supports the agencies, as well as individually.
- Define marketing sales opportunities, craft marketing messaging, and create a deliverable plan.
- Build Relationships. Create, foster and maintain strong, meaningful relationships with key staff and Principals within the brokerage general agencies. Represent LifeTrends® in a very professional and thoughtful manner.
- Develop organization standards and methods of tracking sales via. Build and maintain a sales tracking system via CRM (prospecting, follow-up, etc.). Assist with CRM efficiency and support by working with technology, account managers and key staff.
- Hold a fundamental understanding or product. Identify product improvements. Be the expert connection between our clients and the internal analyst and support staff.
- Mentor sales support and account managing staff. Engage staff to support sales related goals and initiatives. Work with staff to define opportunities and ways in which we can effectively "sell our story."



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- Gather Feedback. Gather ideas for LifeTrends® product development initiatives and enhancements, stress testing analysis or deeper dives into ways in which products are positioned and sold. Actively participate in discussions that contribute to the growth of such resources.
- Field (or source) presentation opportunities and adequately manage timelines to develop and deliver “off the shelf” presentation content.

### **JOB REQUIREMENTS**

**EDUCATION:** Bachelor’s degree in business, marketing, management, finance or economics preferred. Equivalent industry experience is acceptable.

**EXPERIENCE:** 10+ years of related professional experience; Experience with a Sales Office (producer, brokerage general agency, insurance marketing organization, producer group) or Life Insurance Company (sales, marketing, product research and development, competitive or market intelligence, pricing) is preferred.

**KNOWLEDGE, SKILLS & ABILITIES:** Solid understanding of life insurance practices, products, standards, and concepts; Presentation Skills, Client Relationships, Emphasizing Excellence, Energy Level, Negotiation, Prospecting Skills, Meeting Sales Goals, Creativity, Sales Planning, Independence, Motivation for Sales, Understanding of Life Insurance Products

**TRAVEL REQUIREMENT:** 20% to 35%, maybe more depending on their self-initiated goals and objectives

**TYPE OF POSITION:** Full-Time, Exempt

### ***LIMITATIONS AND DISCLAIMER***

The above job description is meant to describe the general nature and level of work being performed; it is not intended to be construed as an exhaustive list of all responsibilities, duties and skills required for the position.

All job requirements are subject to possible modification to reasonably accommodate individuals with disabilities. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees will be required to follow any other job-related instructions and to perform other job-related duties requested by their supervisor in compliance with Federal and State Laws.

Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the employee must possess the abilities or aptitudes to perform each duty proficiently. Continued employment remains on an “at-will” basis.

***If you are interested in being considered for the position, please submit your resume online - <https://lifetrends.com/about/careers/>.***

