



TROPHY CLUB
CONSULTING LLC

"DISCIPLINE TAKES NO VACATION"

ELEVATE: RECRUITING & HIRING

THE FOUR POSITIONS

Customer Care Representative

Account Manager

Marketing Associate

Contact Representative/Sales and Marketing Intern



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SAMPLE POSITION DESCRIPTIONS

Account Manager

Take control of your personal and financial future. With a supportive salary, unlimited commissions, professional training and a personal marketing team, you are given the keys to unlocking your success.

Responsibilities

Use a customer-focused, needs-based review process to educate customers about insurance options.

Work with the agent to establish and meet marketing goals.

Develop leads, schedule appointments, identify customer needs, and market appropriate products and services.

Maintain a strong work ethic with a total commitment to success each and every day.

Qualifications

Interest in marketing products and services based on customer needs

Excellent communication skills – written, verbal and listening

Ability to make presentations to potential customers

Ability to execute a detailed business plan

Ability to explain complex financial issues in understandable terms

Property and Casualty license (must be able to obtain)

Life and Health license (must be able to obtain)

Customer Care Representative

Do you enjoy working with people and making meaningful connections? Make a difference with The Wyant Group in your community today!

Responsibilities

Provide prompt, accurate, and friendly customer service. Service can include responding to inquiries regarding insurance availability, eligibility, coverages, policy changes, transfers, claim submissions, and billing clarification.

Use a customer-focused, needs-based review process to educate customers about insurance options.

Develop leads, schedule appointments, identify customer needs, and market appropriate products and services.

Qualifications

Ability to resolve complex customer issues

Excellent communication skills – written, verbal and listening

Pride in getting work done accurately and timely

People-oriented

Ability to work in a team environment

Ability to multi-task

Property and Casualty license (must be able to obtain)

Life and Health license (must be able to obtain)

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SAMPLE POSITION DESCRIPTIONS

Marketing Associate

Are you great with people? Be the catalyst of a growth oriented firm and experience true marketing success with our results driven team. Combine your creativity with our marketing excellence.

Responsibilities	Work with the agent to establish and meet marketing goals.
	Develop leads, schedule appointments, identify customer needs, and market appropriate products and services.
Qualifications	Interest in marketing products and services based on customer needs
	People-oriented
	Organizational skills
	Detail oriented
	Ability to make presentations to potential customers
	Bilingual – Spanish preferred

Sales & Marketing Intern

Looking for a part-time or full time position that provides meaningful work and competitive compensation? The Wyant Group allows you to learn and gain experience with one of the top Financial and Insurance Firms in the nation. Are you our next success story?

Responsibilities	Work with the agent to establish and meet marketing goals.
	Develop leads, schedule appointments, identify customer needs, and market appropriate products and services.
Qualifications	Excellent communication skills – written, verbal and listening
	Self-motivated
	Detail oriented
	Property and Casualty license (opportunity to be able to obtain)



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RECRUITING

Social Media

Job Boards

Career Fairs

Other



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APPLICANT COMMUNICATION

Application Form

Post-Application Email

Interview Scheduling

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GROUP INTERVIEW

Introduction

About the firm

Tell us about yourself

What has you looking for a new opportunity

Open for questions from applicants

Follow up quesitons

Direct messages for recruiting visit



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RECRUITING VISIT

Job Shadow

Assessments

Candidate Review

Offer

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OFFER LETTER

INSERT BUSINESS NAME

Insert Address
Insert Phone Number

Insert Logo
or Photo

Dear _____,

We are pleased to offer you a position as an Account Manager in _____. We trust that your knowledge, skills, and experience will serve our firm and customers well.

Job Description: As an Account Manager your role will be to market and sell SF products and services.

- Annual Salary: \$XX,XXX
- Signing Bonus: \$XXX

****Signing bonus contingent upon successful completion of _____ pre-employment training**

- Monthly Bonus:

****Based on monthly paid policies**

- 50+ \$XXXX
- 75+ \$XXXX
- 100+ \$XXXX
- Annual travel incentive:
 - Trip for two and three additional paid vacation days
 - Destination and Qualifications TBD

- Start Date: September 7th, 2021 at 8:15am

- Location: _____

- Prior to your start date you must successfully complete _____ pre-employment training, obtain the _____ State Property/Casualty License, and pass a background check.

- You will also be required to obtain the _____ Life/Health/Annuity License to be eligible for monthly bonus

Our firm is excited about the prospects of having you as part of our team. We feel this will be an exciting and challenging career with numerous growth opportunities for you. If you have any questions please contact us at the number listed above.

Sincerely,

Insert Date

INSERT NAME
EMAIL ADDRESS

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ONBOARDING PROCESS

Offer Letter

Enroll in Pework
Schedule Final Assessment

Pework

One week to complete Pework
Final Assessment on day five

Licensing

Schedule licensing
Give candidate access to license study materials

Start Date

Enroll in Evolve
Enroll in Company Training




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2022 Commission Sheet Template									
Policy		Bonus	Number	Amount (Prem)	Bonus (Subtotal)	Add Bonus		Total	
Auto		\$ 25.00	40		\$ 1,000.00	35+ Auto	\$5 added per car		
Auto - Total			40		\$ 1,000.00		\$ 25.00	\$	1,025.00
Apartments		\$ 500.00	0		\$ -	75 Apps	\$100 bonus	\$	100.00
Worker's Comp		\$ 25.00	1		\$ 25.00	100 Apps	\$200 bonus	\$	-
Business		\$ 50.00	2		\$ 100.00			\$	-
Home/Farm		\$ 25.00	10		\$ 250.00			\$	-
RDP		\$ 15.00	3		\$ 45.00			\$	-
Condo/RCUP		\$ 10.00	0		\$ -			\$	-
Mobile Home		\$ 10.00	0		\$ -	10+ HO/RDP	\$50 bonus	\$	-
PLUP/CLUP		\$ 10.00	6		\$ 60.00			\$	-
Trailers/ATV		\$ 5.00	3		\$ 15.00			\$	-
Pet Insurance		\$ 20.00	3		\$ 60.00			\$	-
PAP		\$ 5.00	5		\$ 25.00				
Fire - Total			33		\$ 580.00		\$ 100.00	\$	680.00
TIER 1 48 Policies	TIER 1	Term	10%	0	- \$ -				
		Limited Pay	10%	0	- \$ -				
		Whole	15%	0	- \$ -				
		Universal	15%	0	- \$ -				
TIER 2 8+ Policies	TIER 2	Term	15%	5	3,000 \$ 450.00				
		Limited Pay	15%	0	- \$ -				
		Whole	20%	3	2,000 \$ 400.00				
		Universal	20%	0	- \$ -				
TIER 3 10+ Policies	TIER 3	Term	17%	0	- \$ -				
		Limited Pay	17%	0	- \$ -				
		Whole	22%	0	- \$ -				
		Universal	22%	0	- \$ -	Bonus \$4800/yr	add \$200		\$200
Initial Dep	Deferred Life Annuity	1%	0		\$ -				
	SPIA	1%	0		\$ -				
Based on Ann Prem	Life - Total		8		5,000 \$ 850.00			\$	1,050.00
	Disability Insurance	25%	5		1,000 \$ 250.00	Bonus \$3000/yr	add \$200		
	Med Supp	5%	0		- \$ -			\$	-
	Hospital Indemnity	\$ 25.00	0		\$ -				
	Health - Total		5		1,000 \$ 250.00			\$	250.00
	TOTAL Monthly		86		\$ 2,680.00			\$	3,005.00
TOTAL Yearly		1032					\$	36,060.00	



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