

# Commercial Lines Advisor

**Department**

Commercial Lines

**Reports To**

Sales Director of  
Mentorship

**FLSA Status**

Exempt

## POSITION SUMMARY

The Mahoney Group is an established agency that delivers expert advice to our clients to inspire the confidence to face whatever lies ahead. The Commercial Lines Advisor is passionate about people and developing relationships, is results-oriented, and focused on achieving results.

## OBJECTIVES

- Review, research, and qualify prospect data to identify potential sales opportunities
- Identify the needs and risks of clients and prospects to determine the proper services, products, and/or combinations that will best serve their objectives
- Engage internal resources for initial and ongoing prospect sales meetings and proposals
- Prepare proposals, contracts, and/or other sales-related material
- Ensure timeframes and deliverables are met in the sales process and ensure that post-sales teams provide quality service to all assigned clients
- Transition new clients to the Account Management teams and remain active in developing and expanding existing clients
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- Support trade show, event activities and targeted marketing campaigns as needed
- Keep abreast on prospects' and clients' current issues and educate on industry trends

- Establish and cultivate positive business relationships with prospective and existing clients
- Develop and maintain effective network within the business community and industry

## **COMPETENCIES**

- Possess an enthusiastic attitude and have a winning mind-set
- Be a great self-starter with a sense of urgency
- Excellent communication & interpersonal skills

## **EDUCATION & EXPERIENCE**

- Prior Property & Casualty experience
- Insurance sales: 1 year (Required)

## **LICENSE/CERTIFICATION**

- State specific insurance license or ability and desire to obtain

## **PHYSICAL REQUIREMENTS**

The physical requirements are representative of those that must be met to successfully perform the essential functions of this job.

- Sit at a desk and use a computer for extended periods of time
- Lift and/or move up to 10 pounds and up to 25 pounds on occasion
- Regularly talk to communicate and hear to understand
- Use hands to reach and grasp and use fingers to feel and touch
- Ability to see with close vision and ability to adjust focus

## **WORK LOCATION**

- Hybrid Remote in Mesa, AZ 85210

## **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those that may be encountered while performing the essential functions of this job. Job duties are performed in an indoor office setting with computers, telephones, and copy/print machines. Noise levels are minimal to moderate.

## **COMMITMENT TO DIVERSITY**

As an equal opportunity employer committed to meeting the needs of a multigenerational and multicultural workforce, The Mahoney Group recognizes that a diverse staff, reflective of our community, is an integral and welcome part of a successful and ethical business. We hire talent at all levels regardless of race, color, religion, age, national origin, gender, gender identity, sexual orientation, or disability, and actively foster inclusion in all forms both within our company and across interactions with clients, candidates, and partners.

## **BENEFITS**

- Employee stock ownership plan
- Immediate 401K Matching
- Generous time off policy
- Comprehensive company sponsored health insurance
- Dental and vision insurance
- Life insurance
- Flexible spending and Health Savings Account