

Relationship Manager Job Description 2024

Job Title: Relationship Manager
Reports To: Karen Obendorf – Director of Producer Sales & Promotions
Department: Marketing Field Support
Status: Non-exempt
Pay Range: \$24 - \$25/hr. plus incentive compensation
Work Hours: M-F 8:00 am - 4:30 pm PST

Position Summary:

This position will be key in building strong relationships and rapport with our insurance agents and financial advisors through hands-on account management, advisory, and dedication to meeting the agent's needs. This role will be responsible for all aspects of agent interaction, supporting the company's overall initiatives of agent retention and growth. This role will be the primary point of contact for other departments within the Company, ensuring an overall agent experience of superior service.

Essential Duties of the position:

- Ensure successful engagement with new and existing insurance agents and financial advisors by building strong relationships and rapport
- Collect and update insurance agent and financial advisor profiles for development of strategic marketing campaigns and Company initiatives.
- Motivate insurance agents and financial advisors through education on Legacy's exclusive products and appropriately position them against the competition.
- Assist with case design, product recommendations, and competitive analysis.
- Provide superior service to the insurance agent and financial advisor by promptly responding to calls and going above and beyond to successfully meet their needs or resolve problems.
- Provide "feedback from the field" to dept manager that can help to determine future competitive product and program offerings as well as share constructive feedback to improve any sales/service issues.
- Assist in resolving escalated debit balance issues as needed.

* Legacy Essential Duties

Minimum Requirements to Perform Essential Duties of the Position:

- 1 Sales or customer service experience a plus
- 2 Professional in written and verbal communication. Ability to articulate key product benefits/features
- 3 Intermediate level of skills w/Microsoft office; Outlook, Excel, Word, PowerPoint.
- 4 Strong problem solving skills and the ability to perform under pressure in a calm manner.
- 5 Ability to multi-task in a constantly changing environment. Excellent organization skills.
- 6 Ability to work collaboratively within a team environment.
- 7 Ability to work independently without immediate supervision.

Ideal/Preferred Requirements to Perform Essential Duties of the Position:

- 1 Knowledge of annuity products would be ideal, but not required

Legacy Essential Duties:

In the spirit and support of Legacy's Corporate Culture and Work Team environment, it is the expectation that all employees will act in ways that support our Values by participating in the following:

Communication-Ensure that information is delivered effectively for positive and strong relationships.

Continuous Improvement-Strive to set and reach a higher standard in everything you do.

Flexibility- to go outside of your regular job duties to support the team, department, and organization needs.

Performance Alignment and Accountability-Create and meet objectives that are in sync with team, department, and organization goals and objectives.

Problem Solving and Conflict Resolution – Address problems and resolve conflict in a timely manner in an effort to find positive solutions and create action plans that support the bigger picture.

Recognition-Motivate co-workers by providing positive reinforcement of good to great results.

Shares Knowledge and Supports Others- Ensure the success of all team members and the organization.

Team Member Training- Participate in the training of best possible talent.