



AVERY
INSURANCE

Director of Revenue Operations

About Us:

Avery Insurance is a dynamic and rapidly growing independent insurance agency dedicated to providing insurance solutions for successful individuals, families, and businesses. Our innovative approach and commitment to excellence have propelled us towards success for the past 125 years. We are family owned and operated. We believe our team is our greatest asset and go above and beyond to ensure that every member feels valued and appreciated. Our team is passionate, they work hard to deliver best-in-class service to our valued clients. As we continue to expand, we are seeking a highly skilled Director of Revenue Operations to join our team and help drive our revenue growth strategies to new heights.

Position Overview:

As the Director of Revenue Operations, you will be responsible for overseeing all aspects of revenue generation, optimization, and efficiency within the organization. Working closely with the executive team, sales, marketing, and other key stakeholders, you will maximize revenue, streamline processes, and drive overall business growth. Primarily you will lead a team of Risk Advisors and the Risk Placement Team to drive revenue in our Commercial Insurance Department. You will also work closely with our Personal Insurance team to maximize growth and cross-selling opportunities.

The ideal candidate will possess a strong background in sales and revenue operations, exceptional analytical and leadership skills, and a proven track record of success in driving revenue growth in a fast-paced environment.

Primary Duties and Responsibilities:

- Lead, motivate, mentor, and otherwise support Risk Advisors and Risk Placement Team Members through hiring, training, coaching and performance management. Provide guidance, support, and resources to help team members succeed in their roles.



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- Serve as a member of the Leadership Team through collaboration with the Director of Commercial Insurance, Director of Personal Insurance and Team Lead for Sales to achieve a united approach.
- Accountable for the development and maintenance of key policies, procedures, and growth initiatives for the Commercial and Personal Sales Teams.
- Coach and Motivate Sales Team:
 - Goal setting
 - Improve sales tools, efficiencies, and tactics for all stages of the sales cycle
 - One on one regular coaching sessions
 - Shadow Sales Teams on calls and meetings and providing support and feedback.
 - Track and report sales performance targets to evaluate progress and identify areas for improvement and growth.
 - Work with Sales Team to actively seek out and identify ideal clients through networking, referrals, and lead generation platforms.
 - Assist Sales Team with prioritizing and organizing tasks to meet goals.
 - Analyze statistical data of wins and losses to determine ways to improve sales practices.
- Lead and organize productive sales meetings.
- Maintain relationships with Insurance Company partners through regular meetings and negotiations; convey essential market information to the team.
- Maintain an awareness of the competition and industry trends.
- Management and Utilization of CRM and Technology:
 - Assist the team is utilizing the most efficient methods and technology for prospecting.
- Ensure all revenue-related activities comply with industry and agency policies.

Knowledge, Skills, Abilities & Key Characteristics:

- Property and Casualty Insurance License
- Minimum 5 years in the insurance industry, including Sales Management and experience in Direct or Outside Sales
- Leadership Experience in customer service industry
- Advanced, comprehensive knowledge of the insurance industry a plus.
- Highly organized, dependable, and detail-oriented able to manage multiple tasks with poise and professionalism in all interactions.
- Demonstrated problem-solving skills and a proactive approach to work.
- Excellent listening skills with a goal of delivering excellent customer service.
- Ability to work with highly sensitive information and always maintain confidence.



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- Strong computer proficiency in Microsoft Office Suite, Google, and eventually the Agency's management system.
- Willingness to adapt to new technologies and learn new skills as needed.
- Team player, self-starter, and one who is also able to gain the trust and support of members of the Avery team.

Other Information:

Salary range \$90,000 to \$110,000 plus bonus potential.

Ability to Travel 50%, regionally.