

Risk Advisor - Sales

ROLE OVERVIEW

The Risk Advisor is responsible for generating new business opportunities and building long-term client relationships. This role is best suited for someone who is energized by connecting with people, developing business through their own network, and being accountable to clear performance expectations.

At CAI, success in this role comes from consistently creating opportunities, building trust, and delivering thoughtful, consultative guidance. Risk Advisors represent the CAI brand in the market and are expected to operate with professionalism, credibility, and a strong sense of ownership over their results.

CORE RESPONSIBILITIES

- Meet or exceed defined new business sales and revenue goals.
- Build and maintain a strong, self-driven pipeline through personal networks, referrals, and proactive outreach.
- Create opportunities through consistent prospecting activity, including calls, meetings, and relationship development.
- Maintain weekly activity aligned with performance expectations (prospecting calls, client/prospect meetings, and pipeline growth).
- Actively participate in networking events, industry groups, and community involvement to develop relationships and generate opportunities.
- Establish credibility in target markets by developing relationships and industry presence.
- Serve as a trusted advisor by identifying client needs and delivering thoughtful, tailored solutions.
- Gather accurate client information to develop competitive, complete submissions.
- Present recommendations clearly and confidently, building trust through transparency and expertise.
- Collaborate with internal team members to support client outcomes and overall agency success.
- Maintain accurate and timely documentation of activities and pipeline progress.
- Continue developing industry knowledge, sales skills, and market expertise.

WHAT IT TAKES TO BE SUCCESSFUL

- Strong personal and professional network, or the ability to quickly build one.
- Self-motivated and comfortable taking full ownership of results.
- Consistent, disciplined approach to prospecting and relationship-building activity.
- Personable, confident, and credible in both one-on-one and group settings.
- Comfortable participating in networking events and representing the company in the community.
- Competitive mindset with a focus on achieving measurable outcomes.
- Strong communication skills with the ability to build trust quickly.
- Commitment to continuous learning and CAI cultural standards.

REQUIREMENTS

- Active insurance license or ability to obtain within 90 days.
- Prior sales experience.
- Bachelor's degree preferred.

CAI CULTURE & EXPECTATIONS

At CAI, how you show up matters. We value clarity, accountability, and follow-through. This role requires someone who takes ownership of their pipeline, contributes to the team environment, and consistently delivers on commitments. Success is measured by both production and the activity required to sustain it.