



Job Title: Sales Specialist (2)
Supervisor: Senior Business Development Advisor
Supervises: N/A
Position Type: Exempt
Location: Fairfield, CT
Date: 3/4/20

Overview of Position:

We are seeking an experienced, dynamic, and highly motivated individual to join our inside sales team. The role requires a person with professional and confident phone skills who is both a self-starter and a strong team player. The Sales Specialist will be responsible for initiating and maintaining sales contacts with prospects generated through multiple marketing channels, the development of relationships with channel partners, nurturing all generated leads, and passing along leads to the Business Development Advisors. The Sales Specialist will work in conjunction with field sales partners in the pursuit of new business. The ideal candidate is a sales professional with a true, “hunter”, mentality, who is savvy and adept at building relationships with key contacts at centers of influence. Experience in financial services is a plus, though not required.

He/she will need to be competent on all current sales tools, which include: Foundation Source Online, Requests, Results, iWave, Discovery Data, Foundation Search and Salesforce (including Salesvue plans). He/she will conduct competitive research and keep information and Salesforce (our CRM tool) up-to-date.

Essential Duties & Responsibilities:

- Research, evaluate and report on competitor, market, and industry growth trends and conditions
- Help drive sales and marketing strategies that target prospects; help position our products as the best solutions for prospective clients
- Participate in the development and support of team goals and strategies to meet or exceed team new client acquisition and revenue goals/objectives and advance Foundation Source’s brand value and market share regionally
- Act as candidate filtration mechanism – Be able to provide feedback to the Regional Sales Teams on whether a prospect is a good fit for our services and be able to back up the recommendation with concrete facts.
- Meeting aggressive individual and team sales goals
- Collaboration with regional field sales partners to develop, implement, and support regional business development and sales plans for each year
- Timely and thorough follow up on leads
- Initiating and maintaining sales contacts with prospects
- Developing relationships with channel partners
- Focused and targeted prospecting
- Working closely with Regional Team to continuously improve territory yield and recognition
- Advocating for the Sales department’s needs and future growth
- Keep Salesforce CLEAN
- Follow up on all drips
- Follow up on all event contacts
- Drive attendance for all regional events
- Enter targeted lists in Salesforce for calling campaigns
- Support 4 regions

Required Daily/Weekly Activities:

- Collaborate with sales teams to understand prospect requirements and provide sales support
- Research and maintain competitive landscape report
- Outbound calling and emailing to introduce the service to new prospects and advisors with goal of qualifying and passing to BDA's.
- Collaboration and partnership with other Director's, MDs, Senior MDs, Inside Sales and other staff members to maximize development
- Meticulous follow up on all prospects
- Enter sales activity accurately, timely, thoroughly and professionally into Salesforce.com or other tools as determined or updated by Foundation Source
- Drive attendance to regional events
- Follow up on attendees after regional/national events

Measures of Success:

- Follow up levels on all leads that are measured in number of qualified leads that turn into closed business
- Presentations to team on competitive landscape
- Cleanliness of data in Salesforce
- Follow up on all attendees at regional and national events

Key Competencies:

- **Interpersonal skills.** Strong interpersonal skills are a valuable characteristic for sales engineers, both for building relationships with clients and effectively communicating with other members of the sales team
- **Self-confidence.** Must be confident and persuasive when making calls
- **Technological skills.** Must have extensive knowledge of FSOL, Requests, Results in order to explain their advantages and answer questions
- This is a relationship-driven business: networking skills and the ability to establish instant rapport/credibility are critical
- Domain knowledge and experience in the financial services industry; philanthropy/private foundation experience essential
- Business acumen: strong working knowledge of business and finance
- Time and territory management skills
- Proven sales skills with an eye for results
- Superlative communication skills with the ability to navigate a wide range of internal and external environments
- Effective communication skills with the ability to listen, understand, educate, and influence prospects

Personal Traits/Strengths:

- Drive, energy and ambition:
 - Candidates must be polished and professional, yet driven in their efforts to succeed and excel
 - Highly motivated with strong entrepreneurial skills
- Work ethic: must be work-driven and be flexible to adjust work day to support later hours when west coast coverage is necessary
- Customer-centered listening needs assessment and presentation skills
- Comfortable interacting with high level wealth managers and the ultra-wealthy
- Image: poised, polished and professional; confident and commanding executive presence
- Personal discipline: Works effectively alone, initiates and takes charge intuitively. Able to deflect substantial business rejection (not take it personally)
- Customer skills – Impressive presentation, listening and needs analysis skills

- High confidence / low ego
- Ability to manage multiple functions simultaneously and work in a fast-paced, constantly changing environment
- Ability to work independently and also participate and contribute as a member of a team
- Motivated self-starter with a can-do attitude
- A competitive nature
- Sense of urgency
- A sense of optimism, resilience, and perseverance
- Solution-oriented

Experience and Education:

- Prior sales experience (minimum of 2 years preferred)
- Solid track record of sales success, (examples of sales accomplishments required)
- Experience with Salesforce.com CRM
- Excellent verbal and written communication skills
- Strong planning, organization, and time management skills
- Thoughtful listening and questioning skills
- Ability to work independently and also actively participate and contribute as a member of a team
- BA/BS Degree
- Experience working with wealth management and financial professionals, as well as familiarity with the tools and techniques of philanthropy is preferred

About Foundation Source

Foundation Source is America's leading provider of support services for private foundations—from set-up and administration to high-level philanthropic advisory services. The company's full suite of back-office, online, and advisory services helps its foundation clients ease the administrative burden, engage board and family members, and deliver greater social impact.

Foundation Source's client base of foundations created and operated by high-net-worth and ultra-high-net-worth individuals and families has grown significantly over the years due to its innovative product offering and strong focus on philanthropy within the market. Today, Foundation Source serves over 1,600 private foundations nationally representing almost \$15 billion in assets under administration. The company is headquartered in Fairfield, CT.

Physical Demands and Work Environment:

- In order to perform successfully the essential functions of this position, an employee must generally be able to do the following: communicate verbally (speak and hear); use hands or fingers; handle or feel objects, tools, or controls; stand; walk; sit; reach with hands and arms; occasionally lift and/or move up to 15 pounds; drive and write coherently and grammatically in English. The position requires the ability to see objects, print, and/or images at close range and in the distance, and the ability to adjust focus. The noise level in the work environment is usually low to moderate. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of the position.

NOTE:

- This job description does not include all of the duties that may be required of an employee in this position. Other functions, tasks, and duties may be assigned by the Company, in its discretion. To perform this job successfully, an employee must possess the skills, aptitudes, and abilities to perform each duty proficiently. Educational and experience requirements listed in this document are the minimal requirements for consideration for the position. The set of functions considered "essential" is subject to modification by the Company. Foundation Source will provide reasonable accommodations to enable otherwise qualified individuals with disabilities to perform the essential functions of this position. This job description does not create an express or implied employment agreement; in the absence of a specific written agreement to the contrary, all Foundation Source employees are employed "at will," and may resign or be discharged at any time, with or without notice.

Foundation Source is an Equal Opportunity Employer, maintains a drug free workplace, and complies with the ADA.

All applicants are considered without regard to race, color, religion, sex, gender identity, sexual orientation, pregnancy, age, national origin, ancestry, physical/mental disability, military/veteran status, genetic information, marital status, or any other protected characteristic under applicable federal, state, and local laws. By completing this application, you are seeking to join a team of hardworking professionals dedicated to consistently delivering outstanding service to our customers and contributing to the financial success of the organization, its clients, and its employees. Any applicant requiring a reasonable accommodation to complete the application and/or participate in the interview process should contact a management representative.