



Job Title: Sales Analyst
Supervisor: Chief Revenue Officer
Supervises: N/A
Position Type: Exempt
Location: Fairfield, CT
Posted Date: 10/7/2020

Overview of Position

Foundation Source is seeking a seasoned, energetic, and collaborative Sales Analyst to join our team. This person will be involved in planning, tracking, and forecasting regarding leads, opportunities, closed deals and channels. The Sales Analyst will be responsible for verifying data accuracy as well as interpreting and delivering data trends to many different departments within the organization and to the board. This person will affect change behind the scenes by being an informed and relied-upon sales team member. The Sales Analyst is expected to maintain regular reports, identify opportunities via ad hoc analyses, and make recommendations for maximizing sales. You will have the chance to learn about all aspects of account management, marketing, and field sales.

The Sales Analyst is primarily responsible for delivering analytical projects, including lead, contact, opportunity, and sales maintenance and reporting. Additional projects may include collecting and organizing data on pricing, distribution, promotions, competitive tactics, field sales effectiveness, demo ROI, and more. Demonstrating exceptional analytical skills, the Sales Analyst will draw conclusions and make recommendations. A heavy emphasis on Excel and Salesforce will require this person to build tools that help automate and/or advance stakeholders' ability to efficiently identify meaningful trends and insights.

The Sales Analyst asks the right questions to assess internal stakeholder needs for information and analytics and fit with Foundation Source services and products. The Analyst engages to understand challenges and needs plus identify potential solutions. This person provides positive insights. Ultimately, the Analyst is responsible for owning the sales data and output to inform sales strategy and impact.

Essential Responsibilities

- Assist in the sales process through data analysis.
- Collect and analyze data from Salesforce and other sources.
- Closely study and analyze past sales data to determine trends in productivity and forecasting.
- Evaluate current sales goals and enhance reports and processes to best track attainment.
- Participate in discussions on industry trends related to the company's business.
- Use sales prediction software to determine future trends.
- Design and develop sales reports and dashboards and present conclusions to management and members of the board.
- Lead analyses of data to uncover growth opportunities and turn insights into actionable recommendations for all aspects of sales, including but not limited to: distribution, sales, ROI, sales efficiency, market tests, CRM data, and category/channel/competitor trends.
- Manage the business relationship and coordinate reporting with outside software vendors, in collaboration with other team members, to ensure the "right" sales enablement tools.
- Identify and explain channel inventory and forecast risks.
- Monitor lead and opportunity production and assess service demand.
- Conduct analyses of various factors that impact demand, such as category trends, buying patterns, customer response to products, campaigns, and events.
- Prepare and lead informational meetings for staff to explain sales trends and outcomes.
- Proactively assess and execute opportunities to improve data usage.
- Build and maintain relationships with cross-functional partners such as Marketing and Finance.
- Generate regular reports for executive, marketing, and sales teams. Prepare daily, weekly, quarterly, monthly, and annual sales reviews.
- Lead processes to maintain and enhance Salesforce databases.

Measures of Success

- Timely and accurate data to forecast sales
- Documentation and cleanliness of data in Salesforce
- Precise reports to inform decision-making
- Collaboration with sales and across departments

Qualifications

- At least 4 years of related professional experience
- Experience in sales, finance, consultancy, or financial services is essential
- Background in data analysis and/or business analysis
- A background in philanthropy is not required but is a plus
- Be well versed in data aggregation
- Be able to compile data from different sources into formats that are presentable to team members
- Effective quantitative analytical skills with exceptional attention to detail is a must
- Proficient in SQL and familiarity with BI tools such as Power BI or Tableau
- High proficiency level in Microsoft Excel and Salesforce
- Be able to communicate with customers and colleagues about gathered data
- Strong background in forecasting
- Ability to recognize and analyze trends
- Highly organized and very calendar/event driven
- Team player
- Self-motivated with a sense of urgency
- Ability to work without extensive supervision or direction
- Continuously improve quality of work/processes and exceed results
- Desire to develop new paths and create change

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 1,700 private foundations nationally representing almost \$16.5 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; 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.