



**Job Title:** Business Development Representative  
**Supervisor:** Business Development Representative Team Lead  
**Supervises:** N/A  
**Position Type:** Exempt  
**Location:** Fairfield, CT  
**Effective Date:** 2/11/21

### **Overview of Position**

Foundation Source is seeking an energetic, self-motivated, collaborative Business Development Representative (BDR) to join our team. The BDR will respond to inbound leads and qualify new business opportunities for the sales team. The BDR is also responsible for outbound leads, initiating the prospecting process, qualifying leads across channels, and building the pipeline for sales. The sales strategy and a region's strategy will guide the BDR on targeted outreach based on ideal client personas and hubs of opportunity. Based on sales priority, the BDR will identify prospective clients using databases as well as other sources and will nurture previously sourced leads from the company's CRM. All prospects will be researched by the outbound BDA to gather key information prior to contact.

The BDR is a "first point of contact" with prospective customers, engaging them over the phone and by email. The BDR asks the right questions to assess prospect interest in and fit with Foundation Source services and products. The BDR engages with prospects to understand their challenges and needs plus identify potential solutions. The BDR will be highly knowledgeable about Foundation Source products and services and confidently share relevant information with prospects. The BDR provides positive insights as a product knowledge specialist. Ultimately, the BDR is responsible for owning the prospecting process for inbound leads, qualifying the leads, and documenting in Salesforce lead attributes. The BDR is central to filling the top of the funnel pipeline for Foundation Source services and will pass qualified leads to the sales team.

It is expected that the BDR will leverage all accessible tools, resources, and support to meet and exceed all KPIs and business development quota. This position provides an opportunity to position leading-edge private foundation management solutions for premier organizations while also providing an opportunity for future growth and advancement.

Successful candidates must demonstrate curiosity, passion, drive, and an ability to be coached. The BDR must be comfortable working with cross-department teams. Prior experience in financial, consulting, or sales fields is preferred.

## **Essential Responsibilities**

- Identify, prospect, and qualify leads based on ideal customer profile or pre-defined criteria
- Conduct research on prospects to ensure they are strategic targets
- Develop an educated, researched point of view before prospecting a lead
- Systematically prospect into leads via email, social media (e.g., LinkedIn) and phone
- Gain commitments from prospects to continue in the sales cycle
- Document all activity and lead information in Salesforce
- Handoff to sales all qualified leads
- Consistently meet or exceed daily outbound activity KPIs
- Proactively stay on top of prospect vertical market and company trends
- Continuously learn the industry in order to demonstrate relevant subject matter expertise to prospects and centers of influence
- Collaborate with team and manager to overcome objections and improve in each aspect of the BDR role (e.g., discovery, time management)
- Leverage all business development optimization tools
- Participate in the development and support of team goals and strategies to meet or exceed lead generation expectations
- Collaborate with teams to advance business development and sales plans for each year
- Review and actively work previously sourced leads in Salesforce to ensure these leads are optimized for sales
- Participate in business development team projects and initiatives as needed

## **Measures of Success**

- Follow up levels on all leads
- Number of qualified leads handed off to sales
- Thoroughness of discovery
- Documentation and cleanliness of data in Salesforce

## **Experience and Education**

- Minimum of two years of professional experience
- Prior experience in philanthropy, financial services, consulting or inside sales preferred
- Solid track record of success (examples of accomplishments required)
- Experience with Salesforce.com
- Excellent communication and presentation skills (verbal and written) essential
- 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

## **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.