



**Job Title:** Business Development Representative  
**Supervisor:** Business Development Manager  
**Supervises:** N/A  
**Position Type:** Exempt  
**Location:** Fairfield, CT and/or Remote  
**Effective Date:** 11/12/21

## **What We Do**

Foundation Source helps people and companies make a difference in the world with their private foundation giving

## **Overview of Position**

Foundation Source is seeking an experienced, self-motivated, collaborative Business Development Representative (BDR) to join our team. You will join as we dynamically leverage our technology and services for private foundations to grow our business. The BDR will respond to inbound leads and qualify new business opportunities. The BDR is also responsible for outbound leads, initiating the prospecting process, qualifying leads across channels, and building the pipeline. The sales strategy will guide the BDR on targeted activity 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.

The BDR is a "first point of contact" with prospective customers, engaging them over the phone, by email and through virtual meetings. 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 and be highly knowledgeable about Foundation Source products and services and confidently share relevant information with prospects. The ability to expertly qualify and seamlessly hand-off leads to sales is critical.

It is expected that the BDR will leverage all accessible tools, resources, and support to meet and exceed all OKRs 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, and drive. A flexible and adaptable mindset is essential. The BDR must be comfortable working with an existing sales team and cross-department teams. Experience in philanthropy or financial services is preferred.

### **Essential Responsibilities**

- Identify, prospect, and qualify leads based on ideal customer profile or pre-defined criteria
- When possible, research prospects before contact to gauge their potential fit
- Develop an educated, researched point of view before prospecting a lead
- Systematically prospect into leads via email, social media (e.g., LinkedIn) and phone
- Ensure sales motions are aligned to strategic targets
- Conduct demos of technology platform(s)
- Understand customer need and speak to value propositions for all offerings
- Gain commitments from prospects and handoff qualified leads to sales
- Document all activity and lead information in Salesforce
- Review and actively work previously sourced leads in Salesforce to ensure these leads are optimized for sales
- Consistently meet or exceed activity metrics and sales revenue targets
- Proactively stay on top of prospect vertical market and company trends
- Continuously learn the industry to demonstrate relevant subject matter expertise to prospects and centers of influence
- Partner with sales and other cross-functional teams to drive product and company success
- Leverage all business development optimization tools
- Assist in gathering and analyzing SaaS sales data to inform sales strategy and motions
- Participate in business development projects and initiatives as needed

### **Key qualifications**

- At least 2 years inside sales experience required
- Solid understanding of sales motions
- Proven track record of achieving individual and team goals
- Comfort making “cold” calls
- Ability to help grow a business through lead generation
- Passion for foundations and non-profit sector, and deepening customer relationships
- Solid track record of success (examples of accomplishments required)
- Experience with Salesforce.com
- Ability to work independently and take the lead on projects to deliver on results

- Excellent communication and presentation skills (verbal and written) essential
- Ability to work independently and 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**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

### **Note**

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each

duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.