



Job Title: Sales Specialist, Existing Foundations
Supervisor: Sales Enablement Manager
Supervises: N/A
Position Type: Exempt
Location: Fairfield, CT and/or Remote
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 energetic, driven, overlay sales specialist for private foundations. As a sales specialist, you will support the national sales team to grow our relationships with existing foundations. You will join the team as we dynamically leverage our technology and services for private foundations to expand our business. This role is critical to Foundation Source's success and revenue growth goals as an integral strategic role. Your experience in sales and philanthropy will be critical to your success.

As a sales specialist, you will represent Foundation Source and its offerings to foundation leaders. You will be responsible for building and maintaining strong relationships with foundation-focused centers of influence to advance business opportunities with established private foundations. To accomplish this, you will hold meetings (in-person and virtual), conduct webinars, do public speaking, build awareness, and deepen relationships. You will be fluent in private foundations and our value proposition and be expert in discussing our services and providing platform demos. Using a consultative approach while being a true "hunter," you will identify prospects and generate leads. You will also generate leads from marketing-driven campaigns and inside sales-led outbound activities. Ultimately, when you develop a qualified lead that is an existing foundation, you will partner with the field salesperson to advance the relationship through to engagement. During this process, you will collaborate with internal subject matter experts, and especially work closely with client services to ensure a successful customer journey from sales to service.

The sales specialist role will partner with the Marketing Team to leverage private foundation stories and interactions into public-facing materials that can be used to to advance sales to existing foundations.

Successful candidates must demonstrate curiosity, passion, expertise, and collegiality. The sales specialist must be comfortable working as part of a team. As part of the Sales Enablement Team within Sales, you will collaborate with regional sales teams, and you will contribute to the national sales team to help build an esprit de corps. Prior sales experience and experience in philanthropy is required.

Essential Responsibilities

The sales specialist is responsible for helping to secure new business from existing foundations across the country, working in collaboration with the national sales team.

- Execute on Sales and firm-wide initiatives for existing foundations
- Meet or exceed individual production goals
- Contribute to national sales goals
- Grow your knowledge of the philanthropic sector and private, non-operating foundations
- Serve as the primary contact for existing foundation prospects to qualify and nurture the relationship.
- Introduce field salesperson to a qualified relationship and partner in the sales process to help generate proposals and engagement documents.
- Help establish Foundation Source as a resource for guidance, education, and service among existing foundations
- Collaborate with Marketing on existing foundation collateral
- Build and enhance Foundation Source's public profile with private foundations at events, speaking engagements, webinars, presentations, etc.
- Represent our value proposition and position our cloud-based platform, services, and fees to ensure clarity in offering
- Maintain positive and trust-based relations with influencers, stakeholders and decision-makers
- Work closely with Business Development Representatives on coordinated existing foundation lead generation efforts and actively work qualified leads
- Share best practices and partner closely with the sales team on success stories and strategies for increasing business
- Use Salesforce.com and to capture all sales activity with accuracy and timeliness

Key Qualifications

- At least 3 years of Sales experience and at least 3 years experience working at a private foundation or with private foundations (May consider an alternate combination with more than 5 years of foundation experience)
- Proven track record of delivering sales results

- Critical and strategic thinker who can also focus on details
- Versed in a consultative sales approach
- Expertise in private foundations
- Excellent verbal and written communication skills
- Strong planning, organization, and time management skills
- Independent and results-driven yet a team contributor

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.