



**Job Title:** Account Executive, Software Sales  
**Supervisor:** Mary Ann Stover, CRO  
**Supervises:** None  
**Position Type:** Exempt  
**Location:** Remote or hybrid  
**Travel:** 2%  
**Date:** July 11, 2022

### **What We Do**

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

### **Position Overview**

The Account Executive to help build the market for and deliver sales of our software solutions to private foundations. In this newly created position, you will join a seasoned sales team and mature company as we grow our business through our purpose-built software and services. The Account Executive is strategic to Foundation Source's growth goals.

The Account Executive (AE) will deliver B2C software sales. While we are in the early stages of the product life cycle, the AE will be responsible for developing leads through outbound activities, conducting software demos, answering questions, and advancing opportunities through trial and contracting. Marketing and sales will also generate software leads. The AE will advance these inbound qualified leads through the product sales cycle. Over time, as awareness and demand grow, it is expected that the AE's business development activities will shift from primarily outbound to heavily inbound. Ultimately, the Account Executive drives software sales, so success looks like increasing the number of families and corporations that buy our software.

As our software sales expert, the AE will assist in educating the sales teams on software use cases and value propositions. The AE also will provide insights to Marketing and Product to help inform our customer journey and product roadmap.

The AE will be tech savvy and experienced in software sales. As an engaging, stimulating communicator, poised and capable of projecting enthusiasm and warmth, the AE easily and assuredly makes new contacts. This allows the AE to guide the sales process confidently toward the goal/close, using persuasion, not pressure. The AE will have a strong sense of urgency, initiative, and drive to get things done, with an emphasis on working with and through people in the process. A growth mindset and flexibility are essential.

## Key Responsibilities

### 1. Business Development and Sales (90%)

- Grow sales revenue and hit corporate goals for software
- Generate leads through outbound activities such as dial, email, and social media interactions
- Position value proposition, features, benefits, and pricing to close software sales
- Conduct demos to qualified prospects and answer questions to convert prospects and trial users to customers
- Collaborate with the sales team on software sales opportunities
- Attend tradeshows and conferences, as identified and arranged by Marketing, to represent the company, provide demos, and network with prospects
- Accept and work inbound leads (limited)

### 2. Sales Operations (10%)

- Use Salesforce to record all activities and manage pipeline
- Provide observations on market demand and needs to inform Sales, Marketing and Product on the customer journey and product needs
- Generate sales reports

## What You'll Achieve

1. **Contribute to success of software sales:** As a sales pro, you will help build our software market and contribute to our corporate growth.
2. **Advise our influencers:** Be the first line of contact for software needs at existing foundations and summarize key learnings to our teams and leadership.
3. **Join a fantastic team at a magical time:** We have over 2,000 clients and a growing product line, which gives you a vast green field to help expand our footprint.
4. **Help shape our growth:** As you engage with influencers and prospects, gain insights to help us serve them better — and work with us to inform what we do next.
5. **Elevate your skills as we tackle our most impactful challenges:** We've achieved more than teams 10x our size in less time — and there's so much more to do and learn.

## Key Qualifications

- Bachelor's degree in an IT, business, or sales related field
- 5-plus years as a product sales specialist for financial, legal, family office, or philanthropy software
- Proven results in a quota-oriented sales environment and an understanding of technology and technological innovations
- Experience with enterprise software solutions preferred
- Leadership experience a plus
- Team player
- Self-motivated and able to work independently, while prioritizing objectives to achieve maximum results

- Strong oral and written communication skills
- Ability to travel without restrictions

### **The Whole Package**

Our clients come from all walks of life and so do we. We hire great people from a wide variety of backgrounds, not just because it's the right thing to do, but because it makes our company stronger.

Foundation Source is proud to be an equal opportunity employer. We do not discriminate in hiring or any employment decision based on race, color, religion, national origin, age, sex (including pregnancy, childbirth, or related medical conditions), marital status, ancestry, physical or mental disability, genetic information, veteran status, gender identity or expression, sexual orientation, or other applicable legally protected characteristic.

Foundation Source offers:

- Competitive compensation package that includes a base salary and uncapped commission.
- Well-being through health insurance (individual and family), dental, life, disability, and vision coverage.
- Time to renew through three-weeks of vacation, 10 full holidays, and a scattering of half day Fridays throughout the year.
- The energy of working in the Big Apple with marquee firms.
- Leading-edge computer equipment.
- A team of passionate, mission-driven professionals.
- Opportunity to walk the walk participating in our corporate philanthropy.

If you share our values and enthusiasm, you will find a home at Foundation Source.

### **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 fullsuite 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 2,000 private foundations nationally representing almost \$21 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.