



## **Sales Representative**

Division/Dept: Sales

Type: Full-Time

Title: Sales Representative

### **JOB OVERVIEW**

First Rate is looking for someone who wants a small company experience working with the world's most successful investment management institution vendors in the great cities of America. The sales representative will be responsible for all sales activities in assigned accounts or regions, and will manage quality and consistency of product and service delivery.

### **SPECIFIC RESPONSIBILITIES**

- Present and sell company products and services to current and potential clients.
- Establish potential client relationships and maintain current clients.
- Prepare action plans and schedules to identify specific targets and to project the number of contacts to be made.
- Follow up on new leads and referrals resulting from field activity.
- Identify sales prospects, qualify and contact these and other accounts as assigned.
- Following-up marketing leads
- Prepare presentations, proposals and sales contracts.
- Develop and maintain sales materials and current product knowledge.
- Develop and execute responses to queries from prospects and clients which may take the form of informal requests or more formal RFI/RFP documents
- Coordinate one-to-one client meetings with wealth management to financial institutions
- Prepare paperwork to activate and maintain contract services.
- Manage account services through quality checks and other follow-up.
- Identify and resolve client concerns.
- Prepare a variety of status reports, including activity, closings, follow-up, and adherence to goals.
- Communicate new product and service opportunities, special developments, information, or feedback gathered through field activity to appropriate company staff.
- Coordinate company staff to accomplish the work required to close sales.
- Undertaking demonstrations and/or presentations of selected products
- Manage sales opportunities from first call through closure
- Other duties as assigned.

## **QUALIFICATIONS**

- Excellent written, verbal and presentation communication skills
- Must have knowledge and experience working in the financial investment service industry
- Strong prospecting skills with the ability to understand (customer) business issues
- Strong solution selling skills with the ability to close business
- Ability to persuade and influence others
- Ability to develop and deliver presentations
- Ability to create, compose, and edit written materials
- Strong interpersonal and communication skills
- High degree of self-motivation, positive attitude
- High aptitude for learning technology
- Knowledge of advertising and sales promotion techniques (this is normally acquired through a combination of the completion of a Bachelor's Degree and three to five years of sales or marketing experience)
- Willingness to follow in detail First Rate's selling process, Solution Selling.
- Work requires significant travel to current and potential clients; willingness to work a flexible schedule and occasional overnight travel; the maintenance of a professional appearance and positive company image to the public.
- A Bachelor's Degree and three to five years of sales or marketing experience or a combination of both.
- Work in a smoke-free environment

## **CONTACT INFORMATION:**

**First Rate – HR Division**

[hr@firstrate.com](mailto:hr@firstrate.com)

**817- 525-1900**