



## Sales Representative

Job Title:	<b>Sales Representative</b>	Availability:	<b>Open</b>
Division/Department	<b>Sales</b>	Date Last Modified:	<b>June 1, 2008</b>

### SUMMARY

Responsible for all sales activities in assigned accounts or regions. Manage quality and consistency of product and service delivery.

### PRIMARY RESPONSIBILITIES

- Present and sell company products and services to current and potential clients.
- Establish and maintain current client and potential client relationships.
- 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.

## **KNOWLEDGE AND SKILL REQUIREMENTS**

- Must have knowledge and experience working in the financial investment service industry.
- Financial Investment experience
- Understanding Investment operations
- 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 edits written materials.
- Strong interpersonal and communication skills.
- 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.
- Visibility requires maintaining a professional appearance and providing a positive company image to the public.
- Work requires significant travel to current and potential clients.
- Work requires willingness to work a flexible schedule and occasional overnight travel.
- High degree of self-motivation, positive attitude
- High aptitude for learning technology
- Willingness to follow in detail First Rate's selling process, Solution Selling.
- Excellent written, verbal and presentation communication skills.

## **WORKING CONDITIONS**

Working conditions are normal for an office environment. Work requires significant local travel and may require occasional overnight travel and weekend and/or evening work.

Non-smokers only

## **CONTACT INFORMATION**

First Rate – Human Resources Division

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