



Inside Sales/Business Development Specialist

This is a Regular Full-time Ongoing Virtual Employment Opportunity

What It Means by “Sharing the IFI Experience”

We are unique and some may describe us as being quirky in a fun way because we like to celebrate our differences; both personally and professionally. Things in our world are always changing, and our employees are challenged every day--either using new technologies or by the creation of perspectives through the lens of a kaleidoscope. Each day is different, and it is never the same old thing.

We offer an environment where you are continuously learning and there are opportunities for personal growth and development.

About the Career Opportunity:

You will assist with our Business Development/Inside Sales area by working closely with our senior business leaders by processing leads through the sales cycle, supporting some of our more direct marketing efforts and by managing our client’s onboarding, renewal and offboarding processes. This primarily entails working with leads and Clients and using our Salesforce CRM database for updating contract information, ensuring clients have submitted all required information, tracking of leads and more.

This position requires someone who can multi-task, change directions quickly and has strong attention to details (we can’t let anything slip through the cracks).

Some of the general responsibilities include:

- Researching organizations and individuals to find new sales opportunities.
- Developing quotes and proposals for clients by gathering required information in a fast-paced environment.
- Develop and maintain client relationships.
- Gather and record useful information from customers.
- Managing the prospect pre-sales process including scheduling meetings, recording and tracking meeting follow up, working with internal staff to develop pricing, quotes and ensuring that all final Agreements and Statements of Work are complete and approved before submitting them to the prospective client.
- Managing the client onboarding process including verifying all contracts are properly initiated by working with internal staff on pricing as an example, and that all contracts are properly executed by the client.
- Accurately maintaining our CRM Salesforce database by inputting pertinent client information (e.g., terms and conditions, pricing, leads, etc.).
- Scheduling client kick-off calls with multiple members of the internal/external team using Outlook.
- Creating reports in Excel, including updating sales forecast information.
- Following-up on missing documents or information that is needed to complete your assigned tasks.
- Manage the client off-boarding process including communications with the client related to outstanding terms and conditions related to the contract and any payments that may be due.
- Keep Teamwork Project, our project management tool updated as appropriate and modify existing best practices and Standard Operating Procedure templates as needed.
- Taking accurate notes during Prospect and Client sales pipeline review meetings with the internal management team and our partners. Information garnered from these meetings will be put into the Salesforce database for future reference.
- Proactively schedule Contract Renewal reviews before the deadline date to ensure there is enough lead time to take appropriate action with the client and conduct license reviews.



What Qualifications & Talents Are Needed to Be Successful in This Role?

- Education in Accounting or Economics preferred but certainly not necessary
- A minimum of 1- 2 years of experience working in a Inside Sales/Business Development Specialist role
- A successful track-record in a sales role. Our preference is for B2B (Business to Business) sales experience.
- Previous experience using Salesforce, or another type of CRM database system is strongly preferred.
- An ability to use all Microsoft Office products efficiently.
- Strong attention to details!
- An ability to pick up and learn new technologies quickly.
- Must be able to communicate and interact with all levels within an organization (C-Suite and below)
- You have excellent problem-solving skills, with demonstrated ability to create structure and manage ambiguity.
- You have an ability to manage multiple moving parts at a time and are highly detailed.
- You are comfortable operating in a fast-paced entrepreneurial environment.
- Ability to work well with different personalities (internally and externally).
- Self-disciplined and motivated.

Other Noteworthy Information About IFI:

Even though we are all working virtually, we continue to come up with *creative ways of having fun together*. We've by played Pub Trivia, have had live musical performances where we had to guess the artist and the name of the song. To celebrate the start of Summer, we implemented summer hours where the employees can leave early on Friday to start their weekend and each employee is given a \$100 a month until August to spend on a fun activity out with their family and friends.

To celebrate the holidays in 2020, each employee was given 12-gifts and opened one each day of the week, we had a fun virtual White Elephant Gift Exchange, and we had an Ugly Sweater Contest. *We are always looking for adventurous and innovative ways to strengthen our bonds.*

We have a *variety of benefit programs to secure our employee's health, wellness, and financial stability*. Including a 401-k, access to a Financial Advisor and much more!

If there is a special event in your life where you need to take off early or start later in the morning, we understand. *Life and work should be balanced.*

We also make working remotely seamless. Before the virus, we had employees working across the US in multiple time zones and made special efforts to make them feel like they were working side-by-side with their other team members.

Did we mention, we also received an award for being one of the *top 100 Best Places to Work*? Come and look inside our organization by reviewing us on Facebook, Instagram and of course, our home page at www.IFIprofessionals.com.

You will be surprised at how much fun working can be with a great team of talented colleagues and business leaders!