



Job Title: Sales Engineer/Analyst & BDA
Supervisor: National Sales Executive
Supervises: N/A
Position Type: Exempt
Location: Fairfield, CT
Date: 03/18/19

Overview of Position:

We are seeking a hands-on team player to work with our sales team. The ideal candidate will be a strong collaborator with professional and confident interpersonal skills as well as excellent phone and presentation skills. This individual will be working within a team and also be responsible for independent project work. The person in this role will need to be comfortable and well-versed in providing customized online demos, webinars and in-depth competitive research. He/she will need to be competent on all current sales tools, which include: Foundation Source Online, Requests, Results, iWave, Foundation Search and Salesforce (including Salesvue plans). He/she will conduct competitive research and keep information and Salesforce (our CRM tool) up-to-date.

In addition to the above responsibilities, this person will also serve as a Business Development Advisor (BDA) for a small region.

Essential Duties & Responsibilities:

- Work with sales representatives to develop and deliver customized demos of our services (Foundation Source Online, Requests and Results) and ensure demos clearly articulate what problem they will solve for our prospects
- Research, evaluate and report on competitor, market, and industry growth trends and conditions
- Help drive sales and marketing strategies that target prospects; help position our products as the best solutions for prospective clients
- Solicit and log client feedback during the demos and webinars
- Identify areas of improvement
- Work with sales team to interpret prospect requirements and deliver solutions with the end-goal of sales in mind
- Provide answers to internal/external questions about our product and other technical aspects of our services during the sales cycle
- Successfully tailor demonstrations for prospects, trade shows, and special events
- Work closely with the prospect and salesperson to set up and maintain a successful demo period, being available to answer questions and trouble-shoot as needed
- Provide clear and accurate responses for RFPs
- Participate in the development and support of team goals and strategies to meet or exceed team new client acquisition and revenue goals/objectives and advance Foundation Source's brand value and market share regionally
- Act as candidate filtration mechanism – Be able to provide feedback to salesperson on whether a prospect is a good fit for our services and back up the recommendation with concrete facts.

Required Daily/Weekly Activities:

- Prepare and deliver online demonstrations explaining our services to prospects and COI's (Centers of Influence)
- Collaborate with sales teams to understand prospect requirements and provide sales support
- Research and maintain competitive landscape report
- Provide educational webinars to prospects and other CIOs
- Coordinate with marketing to ensure timely follow up on all drips
- Create Salesvue plans for BDA team to follow up on drips
- Outbound calling, meeting and emailing to introduce the service to new prospects and advisors
- Collaboration and partnership with other Director's, MDs, Senior MDs, Inside Sales and other staff members to maximize development and closing of new business opportunities
- Meticulous follow up on all prospects
- Enter sales activity accurately, timely, thoroughly and professionally into Salesforce.com or other tools as determined or updated by Foundation Source

Measures of Success:

- Number of product demonstrations per quarter
- Run rate revenue generated through those demonstrations
- Activity levels with high prospect partners and referral sources
- Number of educational webinars per quarter
- Follow up levels on leads

Key Competencies:

- ***Interpersonal skills.*** Strong interpersonal skills are a valuable characteristic for sales engineers, both for building relationships with clients and effectively communicating with other members of the sales team
- ***Problem-solving skills.*** Must be able to listen to the prospect's desires and concerns, and then recommend solutions
- ***Self-confidence.*** Sales engineers should be confident and persuasive when making sales presentations
- ***Technological skills.*** Must have extensive knowledge of FSOL, Requests, Results in order to explain their advantages and answer questions
- This is a relationship-driven business: networking skills and the ability to establish instant rapport/credibility are critical
- Domain knowledge and experience in the financial services industry; philanthropy/private foundation experience essential
- Business acumen: strong working knowledge of business and finance
- Time and territory management skills:
 - Candidates should be adept at sifting leads and prospects quickly for true sales potential
 - Must have strategic ability to manage all aspects of the sales process, and knowledge of when to utilize key resources and company personnel
- Strong ability to quickly comprehend and explain complex grants management concepts in simple, effective terms
- Ability to work in concert with team members to build the most effective presentations that blend technical facts with tangible benefits
- Proven sales skills with an eye for results
- Superlative communication skills with the ability to navigate a wide range of internal and external environments
- Effective communication skills with the ability to listen, understand, educate, and influence prospects

Personal Traits/Strengths:

- Drive, energy and ambition:

- Candidates must be polished and professional, yet driven in their efforts to succeed and excel
- Highly motivated with strong entrepreneurial skills
- Work ethic: must be work-driven and be flexible to adjust work day to support later hours when west coast coverage is necessary
- Customer-centered listening needs assessment and presentation skills
- Comfortable interacting with high level wealth managers and the ultra-wealthy
- Image: poised, polished and professional; confident and commanding executive presence
- Personal discipline: Works effectively alone, initiates and takes charge intuitively. Able to deflect substantial business rejection (not take it personally)
- Customer skills – Impressive presentation, listening and needs analysis skills
 - Doesn't intimidate and is able to integrate with and sell to high level wealth managers and the ultra-wealthy
- High confidence / low ego
- Ability to manage multiple functions simultaneously and work in a fast-paced, constantly changing environment
- Ability to work independently and also participate and contribute as a member of a team
- Motivated self-starter with a can-do attitude
- A competitive nature
- Sense of urgency
- A sense of optimism, resilience, and perseverance
- Solution-oriented

Experience and Education:

- BS / BA degree required, MBA a plus
- A minimum of 5 years successful sales experience ideally serving the HNW market or financial services industry
- B2B outsourced services sales experience will also be considered
- Experience in financial services is a plus, though not required
- Business acumen – Candidates should understand business and financial transactions
- Experience with Salesforce.com and iWave a plus
- Experience working with wealth management and financial professionals, as well as familiarity with the tools and techniques of philanthropy is preferred
- Domain knowledge
 - Financial Services Experience
 - Philanthropy a plus

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 1,500 private foundations nationally representing almost \$14 billion in assets under administration. The company is headquartered in Fairfield, CT.

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.