



Job Title: Business Development Advisor – Inside Sales
Supervisor: National Sales Executive
Supervises: N/A
Position Type: Exempt
Location: Fairfield, CT
Date: 08/20/19

Please send cover letter and resume to careers@foundationsource.com

Overview of Position:

We are seeking an experienced, dynamic, and highly motivated individual to join our inside sales team. The role requires a person with professional and confident phone skills who is both a self-starter and a strong team player. The Business Development Advisor will be responsible for initiating and maintaining sales contacts with prospects generated through multiple marketing channels, the development of relationships with channel partners, nurturing marketing generated leads, and focused targeted prospecting. Business Development Advisors work in conjunction with field sales partners in the pursuit of new business. The ideal candidate is a sales professional with a true, "hunter", mentality, who is savvy and adept at building relationships with key contacts at centers of influence.

Essential Duties & Responsibilities:

- Meeting aggressive individual and team sales goals
- Collaboration with regional field sales partners to develop, implement, and support regional business development and sales plans for each year
- Timely and thorough follow up on marketing generated leads
- Initiating and maintaining sales contacts with prospects
- Nurturing house list relationships
- Developing relationships with channel partners
- Focused and targeted prospecting
- Handling inbound call qualifications
- Working closely with a team of field sales representatives to continuously improve territory yield and recognition
- Advocating for the Sales department's needs and future growth

Required Daily/Weekly Activities:

- Outbound calling, meetings and emailing to introduce the service to new prospects and Centers of Influence (COI's)
- Ongoing relationship management and follow-up with referral sources and opportunities
- High activity levels:
 - Financial partner meetings: the objective is to develop relationships deep in the ranks of partner organizations (PWM, Broker, FA's, clients, bank branches, etc.).
 - Foundation and HNW prospect meetings
- Collaboration and partnership with other Director's, MDs, Inside Sales and other staff members to maximize development and closing of new business opportunities
- Meticulous follow up on all prospects
- Working independently and also actively participating and contributing as a member of a

team

- Conducting independent research to ensure a full profile is created for our prospects
 - This would be done using our online tools (Discovery data base, iWave, Google, etc), reading philanthropic periodicals, current news as well as other channel-related journals.
- Preparing and delivering online demonstrations explaining our services to prospects and COI's (Centers of Influence)
- Coordinating with marketing to ensure timely follow up on all drips
- Outbound calling, meeting and emailing to introduce the service to new prospects and advisors
- Entering 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 foundation relationships established and funded per quarter/annually
- Run rate revenue generated through new relationships established per quarter/annually
- Activity levels with high prospect partners and referral sources
- Success in leveraging company-generated leads and following qualified leads to fruition

Key Competencies:

- ***Interpersonal skills.*** Strong interpersonal skills are a valuable characteristic for Business Development Advisors, both for building relationships with clients and effectively communicating with other members of the sales team
- This is a relationship-driven business: networking skills and the ability to establish instant rapport/credibility are critical
- Superlative communication skills with the ability to navigate a wide range of internal and external environments, listen, understand, educate, and influence prospects and colleagues
- ***Proven Sales and Problem-solving skills.*** Must be able to listen to the prospect's desires and concerns, and then recommend solutions with an eye for results
- 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
 - Strong planning, organization, and time management skills
- ***Self-confidence.*** Business Development Advisors should be confident and persuasive when making sales presentations
- Domain knowledge and experience working with wealth management and financial professionals, as well as familiarity with the tools and techniques of philanthropy/private foundations is strongly preferred

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
 - Thoughtful listening and questioning skills

- Comfortable interacting with high level wealth managers and the ultra-wealthy
- 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 2 years successful sales experience ideally serving the HNW market or financial services industry
- B2B outsourced services sales experience will also be considered
- Business acumen – Candidates should understand business and financial transactions
- Experience with Salesforce.com and iWave a plus
- Domain knowledge preferred:
 - Financial Services Experience
 - Knowledge of Philanthropy/Private Foundations
 - Working with wealth management and financial professionals, as well as familiarity with the tools and techniques of philanthropy is preferred

Additional Considerations

- Ability/willingness to network in the evenings and attend night-time events as needed on occasion
- Occasional travel for training or to visit a prospect may be requested

Work Environment/Physical Demands:

- 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.

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.