

JOB DESCRIPTION

Job Title	Snr. Sales Associate	Job Reference No.	
Department	Sales & Strategy	Created / Revised	August 2021
Reports to	AVP Sales	Staff Supervised	NIL

Type of position:	<input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time <input type="checkbox"/> Contractor <input type="checkbox"/> Intern
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Overall Responsibility – Contribute to our strategic business priorities by delivering on the organization’s sales mandate; (i) leveraging industry knowledge and expertise to grow existing business, (ii) generate new clients and retain relationships (iii) deliver an exceptional client experience through effective relationship management practices.

ACCOUNTABILITIES

- Manage a portfolio of assigned accounts, leveraging new and existing client relationships to meet and/or exceed assigned targets.
- Provide support to other policyholders from time to time.
- Collaborate with internal and external stakeholders to develop appropriate portfolio strategies to deliver on sales targets.
- Partner with the AVP Sales in activities aligned with the execution of successful portfolio management.
- Meet with partnering clients regularly to discuss progress, results, issues, and concerns related to the achievement of sales targets and the retention of the business. Ensure timely escalation and active follow up of client issues through the appropriate channels.
- Meet the needs of and support the company’s clients through presentations, seminars, products and process training and other information sessions with key client representatives and their members/staff
- Support AVP, Sales by the construction, delivery and updating of reports in a timely manner.
- Identify and convert market insights into sustainable selling opportunities
- Relationship Strategy: Develop and leverage a client relationship that facilitates the acquisition of new business and retention of existing business.
- Represent the organization at AGM’s and other Credit Unions events which may from time to time be outside of normal working hours.
- Other related duties as assigned.

SKILLS REQUIREMENTS

- Strong selling skills
- Strong interpersonal skills to excel in a competitive environment
- Strong presentation, oral and written communication skills
- Results focused
- Ability to work independently and in a challenging market.
- Proficient in Microsoft Office Suite (Excel, PowerPoint and Word)
- Plan and prioritize work to meet commitments aligned with organizational goals.
- Gain the confidence and trust of others through honesty, integrity and authenticity.

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EDUCATION, KNOWLEDGE AND CERTIFICATION REQUIREMENTS

- BSc or BA from an accredited institution in a related discipline
- Relevant professional certification in Sales or related discipline would be an asset
- Certification (License) to sell financial/insurance products as per regulatory requirements

EXPERIENCE REQUIREMENTS

- 3 -5 years' experience in a Sales position
- Demonstrated record of achievement in a sales position
- Experience in building strategic relationships

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