

## JOB DESCRIPTION

Job Title	<b>Sales Associate</b>	Job Reference No.	
Department	<b>Sales &amp; Strategy</b>	Created / Revised	January 2022
Reports to	<b>Account Executive</b>	Staff Supervised	

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 CCI’s strategic business priorities by supporting the Account Executive in delivering on the organization’s sales mandate by: (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, in collaboration with the Account Executive; leveraging new and existing client relationships to meet and/or exceed assigned targets.
- Collaborate with internal and external stakeholders to develop appropriate portfolio strategies to deliver on sales targets.
- Partner with the Account Executive in activities aligned with the execution of successful portfolio management. These activities may be delivered on site or remote as necessary.
- Construct, deliver and execute\ support through presentations, other key sales events, and conducting training with credit unions and other strategic partners.
- 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.
- Support the Account Executive in the development, delivery and updating of reports in a timely manner.
- Champion small, medium, and large lead generation efforts.
- Represent the organization at AGM’s and other Credit Unions events which may, from time to time be outside of normal working hours. Craft summary reports to the line and Management based on the attendance of same.
- Other related duties as assigned

## **SKILLS REQUIREMENTS**

- Strong selling skills
- Ability to handle objections / push back creatively
- Strong Sales Personality to excel in a competitive environment
- Strong presentation, oral and written communication skills
- Results focused
- Effective Problem-Solving Skills
- Ability to work in challenging markets
- 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 communicating with senior management

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