

JOB DESCRIPTION

Job Title	Sales Associate	Job Reference No.	
Department	Sales & Strategy	Created / Revised	September 2024
Reports to	Account Executive	Staff Supervised	-

Type of position: Full-time Part-time Contractor Intern

JOB SUMMARY

The Sales Associate is responsible for achieving sales targets and maintaining their current portfolio through direct sales, providing exceptional customer service, and preparing timely reports.

ACCOUNTABILITIES

- Attain sales targets set through working with credit union staff and direct selling to credit union members.
- Achieve sales targets through working with leadership of affinity groups and management of small businesses to sell directly to members/staff.
- Coordinate with the Credit Union management and leadership of affinity groups/small businesses to arrange direct selling opportunities and other customer activities for visits.
- Follow up on enrollment issues including outstanding requirements for enrollments.
- Work with Account Executive to follow up on outstanding Credit Union payments.
- Input/ update activities in company application software.
- Distribute brochures/ marketing materials as required.
- Assist/collaborate with the Account Executive in the execution of promotional activities
- Address minor client issues, ensuring timely escalation of major issues to the Customer Service department.
- Support the Account Executive in training Credit Union staff on company products.
- Collaborate with the Account Executive to deliver engaging presentations to Credit Union staff & members.
- Provide reports as directed by the Account Executive.
- Attend AGMs on behalf of the company as required.
- Other related duties as assigned.

SKILLS REQUIREMENTS

- Strong sales/selling skills.
- Strong oral and written communication skills.
- Strong Presentation skills.
- Strong computer and digital literacy skills
- Ability to foster good client relationships.

EXPERIENCE REQUIREMENTS

- 3 -5 years' experience in Sales position
- Demonstrated record of achievement in a sales position

EDUCATION, KNOWLEDGE AND CERTIFICATION REQUIREMENTS

- Five (5) CXC subjects (General proficiency); Mathematics & English Language compulsory
- Relevant professional certification would be an asset
- Certification (License) to sell financial/insurance products as per regulatory requirements
- Strong understanding of customer and market dynamics
- A valid driver's license and access to a reliable working vehicle.