

Date completed/ revised: DD/MM/YYYY

Position Details

Title	Sales Representative Account Manager
Reports To	Insert title, not individual's name
Department	Sales
Position Status	<input type="checkbox"/> Employee <input type="checkbox"/> Contractor <input type="checkbox"/> Consultant <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> On-going <input type="checkbox"/> Term Term End Date (if applicable): DD/MM/YYYY
Eligible for Benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No Comments if applicable
Overtime Exemption Status	<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt
Variable Compensation	<input type="checkbox"/> Bonus <input type="checkbox"/> Commission <input type="checkbox"/> Shift Premium <input type="checkbox"/> Car Allowance <input type="checkbox"/> Not applicable
Hours per Week	Insert actual expected hours of work per week, excluding breaks or lunch/week
Location	
Job Classification	CUSTOMIZER: If classifications have been established, insert job categories. Below shows an example. Otherwise, delete this row <input type="checkbox"/> Clerical <input type="checkbox"/> Administrator <input type="checkbox"/> Coordinator <input type="checkbox"/> Manager <input type="checkbox"/> Director <input type="checkbox"/> VP
Salary Range	Insert salary range, or insert: "As per Job Classification"
Direct Reports	As of DD/MM/YYYY but subject to change, position is responsible for Insert number direct reports, as follows: ♦ Title. Insert additional bullets as required <input type="checkbox"/> Not Applicable



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Responsibilities/Accountabilities

Responsibilities:

1. Sales **Example 30%**

- a. Establishes and maintains positive business and customer relationships.
- b. Presents solid arguments to customers to promote products and services.
- c. Upsells where appropriate.
- d. Coordinates sales efforts with the rest of the sales department.
- e. Performs needs analysis of existing and potential customers to make sure their needs are being met.
- f. Accelerates the resolution of customer problems to maximize satisfaction.
- g. Reaches out to customer leads through cold calling.
- h. Achieves sales targets within schedule.
- i. Supplies management with reports on customer behavior, including needs, interests and problems.
- j. Informs management if there is potential for new products and services based on customer behavior.

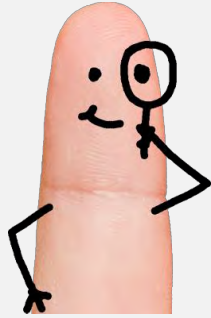
2. Account Management **Example 50%**

- a. Communicates with clients to understand their needs and explain product value.
- b. Builds relationships with clients based on trust and respect.
- c. Identifies industry trends.
- d. Collaborates with sales department to fulfill client needs and reach prospective clients.
- e. Tracks client account metrics.
- f. Keeps records of client transactions.
- g. Resolves complaints.
- h. Prevents additional issues by improving processes.
- i. Maintains updated, in-depth knowledge of Company product.
- j. Trains junior members of the sales team.
- k. Services multiple clients concurrently, while meeting deadlines.
- l. Acts as client advocate.

Focuses on improving the buyer experience.

3. **Insert high-level responsibility Example 20%**

- a. **List key tasks associated with that responsibility**



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Experience/Education/Training	Required	Preferred
Insert experience, diploma, certification, training, or designation		
Insert experience, diploma, certification, training, or designation		

Position Success Traits

INTERPERSONAL SKILLS

- ◆ Effortlessly builds and maintains productive, cooperative relationships with internal and external stakeholders.
- ◆ Demonstrates a strong ability to quickly connect with others, particularly during uncomfortable or stressful situations (such as during the interviewing process).
- ◆ Demonstrates a high Emotional Quotient (EQ) and the ability to read people.
- ◆ Uses tact and diplomacy while still challenging the status quo.

CUSTOMER FOCUS

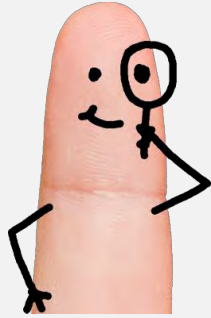
- ◆ Considers internal and external service stakeholders as ‘customers’.
- ◆ Develops and maintains strong relationships with customers.
- ◆ Focuses efforts on discovering and meeting customer needs.
- ◆ Demonstrates a strong commitment to ‘client first’ and ‘do what it takes’ approaches to providing products, services, and support.
- ◆ Looks for ways to improve service.
- ◆ Takes personal responsibility for ensuring satisfaction.

DRIVES FOR RESULTS / TENACITY / BIAS FOR ACTION

- ◆ Strives for results and focuses on reaching goals.
- ◆ Overcomes obstacles, pressure, difficult situations, and conflicting priorities.
- ◆ Sets high performance standards for self and others.
- ◆ Is tenacious, persistent, and resourceful.
- ◆ Translates ideas into action and execution.
- ◆ Understands how to get work done through others.
- ◆ Demonstrates discipline when exposed to distractions.

COMMUNICATION

- ◆ Communicates in a clear, concise, and timely manner.



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Acknowledgement

Accepted and agreed to by:

EMPLOYEE

Employee Name	
Signature	Date

MANAGER APPROVAL

Manager Name	Manager Title
Signature	Date

NEXT LEVEL APPROVAL

All job descriptions require approval by CUSTOMIZER: Insert approval position level 1. Example: Department VP, or delete this section if not applicable.

Name	Title
Signature	Date

HR APPROVAL

All positions require review and approval by HR CUSTOMIZER: Insert HR approval level. Example: HR Manager, or delete this section if not applicable.

Name	Title
Signature	Date