

Date completed/revised: DD/MM/YYYY

## Position Details

<b>Title</b>	Sales Representative   Account Manager		
<b>Reports To</b>	Insert title, not individual's name		
<b>Department</b>	Sales		
<b>Position Status</b>	<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		
<b>Eligible for Benefits</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No      Comments if applicable		
<b>Overtime Exemption Status</b>	<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt		
<b>Variable Compensation</b>	<input type="checkbox"/> Bonus <input type="checkbox"/> Commission <input type="checkbox"/> Shift Premium <input type="checkbox"/> Car Allowance <input type="checkbox"/> Not applicable		
<b>Hours per Week</b>	Insert actual expected hours of work per week, excluding breaks or lunch/week		
<b>Location</b>			
<b>Job Classification</b>	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		
<b>Salary Range</b>	Insert salary range, or insert: "As per Job Classification"		
<b>Direct Reports</b>	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		

This template is included in the ConnectsUs HR™ Toolkits.



### Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

#### Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

#### Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



### Create HR for Clients

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

## Responsibilities/Accountabilities

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### 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		
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## Position Success Traits

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### 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

<b>Employee Name</b>	
Signature	Date

### MANAGER APPROVAL

<b>Manager Name</b>	<b>Manager Title</b>
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.*

<b>Name</b>	<b>Title</b>
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.*

<b>Name</b>	<b>Title</b>
Signature	Date