

Date completed/ revised: DD/MM/YYYY

Position Details

Title	Sales Manager/Director/VP
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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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
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Responsibilities/Accountabilities

Responsibilities:

1. Sales Team Management **Example 30%**

- a. Designs a sales strategy to attain organizational target sales and revenues.
- b. Assesses the strengths and weakness of the sales team and manages sales program accordingly.
- c. Ensures the sales team has necessary resources for high performance.
- d. Delegates responsibility of customer accounts to sales personnel.
- e. Liaises with other departments to ensure sales objectives are achieved.
- f. Investigates lost customer accounts and sales.
- g. Tracks and interprets sales figures.
- h. Formulates sales policies and procedures.
- i. Forecasts monthly, quarterly and annual sales revenue.
- j. Identifies new sales opportunities.

2. Regional Sales Team Management **Example 30%**

- a. Provides leadership and serves as a resource to district sales managers in identifying and resolving sales issues and implementing strategic sales strategies.
- b. Establishes sales objectives by creating a sales plan for districts in support of national objectives.
- c. Accomplishes regional sales objectives, having overall responsibilities for hiring, orientation, onboarding, training and development of employees in assigned districts.
- d. Communicates job expectations, carrying out responsibilities such as:
 - i. Performance reviews and improvement plans.
 - ii. Job evaluations.
 - iii. Planning and reviewing compensation actions.
 - iv. Enforcing policies and procedures.
- e. Contributes to regional sales information and recommends strategic plans and reviews.
 - i. Prepares and completes action plans.
 - ii. Implements production, productivity, quality, and customer-service standards.
 - iii. Resolves problems.
 - iv. Completes audits.
 - v. Identifies trends.

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d.

Job-Related Technical Skills

Skills	Proficient	Experience with	Familiar with
Proven record of meeting or exceeding sales targets	X		
Planning and implementing sales strategy	X		
Market research	X		
Technical sales process skills	X		
'Pipeline' management skills	X		
Closing skills	X		
Customer relationship management	X		
Relevant sales software applications		X	
Account management	X		
Sales pipeline and funnel reporting	X		
Promotional skills	X		
Marketing skills	X		
MS Office suite		X	
A minimum of 35 words per minute typing speed or the ability to use voice to text software to support increasing digital communication and content generation	X		
Enter additional skills if needed			
Enter additional skills if needed			

Experience/Education/Training

Experience/Education/Training	Required	Preferred
A minimum of 3-5 years' experience in a sales management position	X	
Bachelor's or Master's degree in sales, marketing, business administration or a related field		X

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DECISION MAKING

- ◆ Identifies purposes and objectives, assesses situations, and makes decisions while exhibiting judgment and a realistic understanding of issues.
- ◆ When appropriate, involves others in the process.
- ◆ Uses reason even when dealing with emotional topics.
- ◆ Provides rationale for decision. Evaluates results.

INNOVATION / CREATIVITY

- ◆ Thinks outside the box.
- ◆ Challenges status quo and traditional 'the way things have always been done' thinking.
- ◆ Applies original thinking in approach to job and other processes, methods, systems, products, and/or services.
- ◆ Engages in responsible dialogue and brainstorming to develop new ideas and unique solutions to problems.
- ◆ Continuously seeks ways to improve all aspects of the Company and communicates suggestions.

ANALYTICAL

- ◆ Examines and interprets a wide variety of data/information and makes recommendations or decisions.
- ◆ Identifies underlying complex issues.
- ◆ Systematically compares and organizes.
- ◆ Personally investigates and digs deeper to understand new concepts, approaches, and cause-and-effect.

INFLUENCE / PERSUASIVENESS

- ◆ Influences and persuades others to gain agreement or acceptance of an idea, plan, activity, or product.
- ◆ Uses strong arguments and creative approaches to gain support for a point of view or mobilize people to take action.
- ◆ Works to make others feel ownership in solutions.
- ◆ Identifies key decision-makers on issues of concern.
- ◆ Improvises and thinks quickly on one's feet.
- ◆ Sells ideas despite resistance.

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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