QUEST CE

EMPLOYMENT OPPORTUNITY

TITLE: Sales Coordinator – (B2B Software Sales)

REPORTS TO: Sales Manager

HOURS: Salaried – Exempt

Description

Quest CE is a leading technology company with expertise in simplifying state and federal regulations for C-level contacts/decision-makers in the financial services industry (SEC-regulated broker-dealers, investment advisory firms, etc.). In this role, you will support multiple components of the selling process for the Sales Team.

We are looking for a Sales Coordinator to support our Sales Team, as they continue the expansion of Quest CE's web-based solutions across the nation, by generating new accounts and expanding current accounts. The right candidate will be an enthusiastic, self-starter that's not afraid of being a part of an industry/business that is driven by innovation, and therefore, constantly evolving. The ideal candidate will assist with the sales process for our software and services by scheduling meetings for a Sales Executive in response to inbound leads, entering contact/lead info into our CRM, sending follow-up emails, scheduling follow-up meetings for a Sales Executive, etc. This position is perfect for those with an interest in selling, as you will learn the sales process by working closely with our Sales Team. By being open to coaching, and learning the skills required to be a Sales Executive, there is a clear promotion path available!

Responsibilities:

- Schedule meetings for a Sales Executive in response to inbound leads coming from the corporate website, marketing campaigns, and incoming calls, to include entering contact info in our CRM, sending a follow-up email, scheduling a meeting for a Sales Executive, etc.
- Draft price sheets and reviewing service agreements, as directed by the Sales Manager
- Update and maintain CRM data for the Sales Team to ensure the most current lead and contact information
- Type notes following industry conferences, client meetings, demos with prospects, and internal Sales Team meetings
- Observe sales calls and sales demonstrations and provide detailed notes in our CRM
- Schedule meetings for Sales Executives and Sales Manager, as needed
- Create demo accounts of our proprietary SaaS software for our Sales Team
- Attend the monthly Sales Meeting and prepare meeting notes
- Shadow the Sales Team group sales/prospecting calling activity
- Research and write thorough competitive analysis reports and conduct research specifically for the Sales Team
- Help with the testing and reviewing of new services with the Sales Team, i.e., testing of Quest CE proprietary platform updates
- Maintain professional and technical knowledge of the financial services industry by attending educational workshops; reviewing professional publications; establishing personal networks.

Requirements

- Prior professional work experience in a Sales, Marketing, or Account Management role, a plus.
- Bachelor's Degree in business, marketing, finance, or related field, optional
- Demonstrate a high level of negotiation and communication skills, both written and verbal.
- Excellent working knowledge of Microsoft Office Suite applications and the aptitude to learn new systems/programs.
- Ability to prioritize and manage multiple projects and responsibilities, with a keen attention to detail and proven ability to meet project deadlines

What We Offer

We are proud to be nationally and locally recognized as one of the **"Best and Brightest Companies to Work For"**. Our inviting culture fosters collaboration, innovation, and motivates team members to take on important work, every day. We also offer a competitive salary, great benefits including medical, dental, and vision insurance, Health Savings Account, 401K, career growth and professional development opportunities, tuition reimbursement, sustainable work-life balance, and flexibility. Our office location offers a casual-dress workplace, complimentary snacks and drinks, a ping pong table, free onsite gym access and more.

Qualified and interested candidates are encouraged to send a resume to jobs@questce.com