FP TRANSITIONS®

Title: Relationship Development Representative
Classification: Full-time non-exempt, permanent hire
Department: Sales
Reports to: Craig Strauser, SVP of Client Experience

Objective: Identify, track, and develop relationships with future clients in order to build and sustain a robust opportunity pipeline.

Summary:
The Relationship Development Representative owns and nurtures the sales pipeline, bridging the gap between outbound marketing and ultimately client engagement, and coordinates with the sales and marketing teams to cultivate a long-term pipeline valued over $8MM in future revenue. This is a person who can create a flawless first impression and builds rapport easily. The core responsibility of the Relationship Development Representative is to establish the relationship and keep it warm. The Relationship Development Representative qualifies prospects and introduces Sales Executives at the ideal moment to deliver the most impact and assist in closing the client.

Essential Functions (detailed tasks duties & responsibilities):

- Establishes contact with prospects via phone, email, or video conference and conducts follow up as appropriate for company initiatives and the clients' indicated (explicitly or inferred) timeline
- Accurately identifies prospects' consulting need based on their fact pattern and statements, delivers value through content redirects prospects and
- Records appropriate client details in CRM to build an accurate pipeline of future engagements, maintains pipeline data to reflect
- Reads between the lines of client statements to evaluate unidentified client needs and introduce alternative approaches

Required Knowledge, Skills, and Abilities:

- Proven sales skills, including relationship building, and product matching.
- Successful relationship manager across all aspects of business, internally and client-facing.
- Good listening skills, builds rapport easily, responds to emails and messages professionally and in a timely manner, a "people person."
- Able to effectively collaborate with multiple SMEs in different areas of the business to advance prospect engagement.
- Advanced knowledge of Microsoft Office Suite: Word, Excel, PowerPoint, Outlook, Teams

- Familiar with Salesforce CRM or similar relational database

Education and Experience:
Bachelor's degree required: business, marketing, communications, psychology or other liberal arts field
4 years' experience in business development, relationship management, or sales role

Position breakdown:
Manages relationship with 300-500 prospects who represent $8-10MM of future revenue:
  - 50% of time spent contacting and developing relationships with prospects.
  - 30% of time spent analyzing pipeline data and process planning.
  - 20% of time on personal admin tasks and internal relationships
- This role will partner with the following FP Transitions teams: Consulting, Analytics & Research, Valuation, Legal, Advisor Solutions and Sales & Marketing.

Physical factors & working conditions: Full-time exempt, some overtime may be required; office environment, hybrid or remote possible with manager's approval; some travel required

Compensation and Benefits:
- Salary DOE + Performance Incentive
- Medical Vision Dental, 401k with 25% employer match
- Company lunches, snacks, team-building events
- Company holidays (including employee's birthday) and accrued PTO