

<https://www.ucfs.net/job/sales-operations/>

Sales Operations Specialist

Description

The Sales Operations Specialist provides operational and administrative support to Sales and Marketing team members. This person will serve as the go-to resource for new merchant customer onboarding within UCFS' In-Home Sales Channel (**B2B**). The Sales Operations Specialist is part of the sales team and handles our internal and web programs supporting sales processes and initiatives.

Responsibilities

SALES OPERATIONS

- Execute and manage a variety of functions in UCFS' heavily used systems:
 - **HubSpot**
 - Perform monthly CRM data maintenance, data updating and data cleanup projects
 - Handle all back-end HubSpot administrator responsibilities
 - Generate and manage CRM lists that drive email communications and various projects cross-departmentally
 - Run weekly and monthly reports to send to sales management and salespeople
 - PandaDoc
 - Update and organize our eSignature platform when changes are made to our Merchant Agreement and/or Exhibit Pages
 - The company's propriety business system – AS400 – for UCFS' In-Home Sales Channel
- Handle all details of an efficient client onboarding process from start to finish which includes:
 - Gather needed documents to verify prospective merchant business legitimacy and soundness
 - Collect and track approvals of documentation to become a new business customer
- Assist Outside Sales Representatives with internal approval processes

MARKETING

- Update and maintain the company PowerPoint that runs continuously in the lobby
- Develop merchant and consumer brochures to be distributed upon request
- Proofread emails and other materials, as needed
- Provide administrative support to sales and marketing as needed, such as holiday cards, customer gifts.

SKILLS & ABILITIES

- A self-starter on independent projects and tasks and also works well as a contributing member on group projects.

Hiring organization

United Consumer Financial Services

Employment Type

Full-time

Duration of employment

Permanent Position

Industry

Financial Services

Job Location

Westlake, Ohio

Working Hours

full-time position

Date posted

January 5, 2024

Valid through

01.05.2024

- Passionate about using data as a tool for business growth
- Excellent organization skills and ability to keep processes moving forward.
- Ability to see contribution of department from an organizational perspective.
- Communicates effectively (verbally and in writing) to a wide range of internal and external customers/clients/management.
- Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.
- Ability to multi-task in a busy, fast-paced, sometimes stressful environment with frequent interruptions.
- Ability to recognize opportunities and take action to enhance the process flow to increase efficiency.
- Strong attention to detail with thorough proofreading
- Strong ability to see projects through to completion
- Proficiency with a computer, standard office equipment, smart phone, and computer programs
- Strong skills with Adobe Acrobat (PDF) and Microsoft Office Suite (Outlook, Excel, Word, PowerPoint).
- Internet/search engine savvy.

Qualifications

- High school diploma or equivalent; bachelor's degree preferred
- 2+ years' experience in an office environment
- B2B support services experience is preferred
- HubSpot experience needed. HubSpot Academy certifications are a plus

Working conditions

- This individual will work full time, 40 hours per week in our professional office environment in Westlake, Ohio.