

Example Overview

The example below is for a sales person who is selling financial service products. About 75% of his/her time is spent in the office and the other 25% is out on the road making presentations to customers. The job requires a Certified Financial Planners designation and requires heavy duty lead generation.

Job Title: Financial Planning Sales
Classification: Full Time Exempt Employee
Department/Division: Financial Product/ Western Regional
Location: Orange County California
Pay Grade: Level IV (Base + Commission)

Job Requirements

A. Summary of Position

Researches and identifies target client sectors for financial product services. Develops and implements a sales process to include initial contact, follow up, presentation and closing procedures. Maintains records of contacts and sales status including contact reports, sales projections and quota ratios.

B. Job Duties

- 1) Research and Create targeted new client lists within Orange County California territory
- 2) Makes initial contact with potential clients
- 3) Performs routine and regular follow up with potential clients
- 4) Performs routine and regular follow up with former clients
- 5) Visits potential clients and makes sales presentations
- 6) Closes sales
- 7) Maintains regular record reporting sales activity

C. Computer Skills and Software Used

- 1) Windows operating system
- 2) MS Office including Word, Excel and PowerPoint
- 3) Constant Contact or other Customer Relations Management Software

D. Reporting Structure

- 1) Reports to regional sales manager
- 2) Has nobody directly reporting to this position
- 3) Required to participate in Annual Sales Meeting

Employee Requirements

A. Education and Training

- 1) Bachelor Degree in business, finance or accounting or 5 Years experience and High School Diploma. Bachelors Degree Preferred
- 2) ABC Financial Planning - Level 3 or higher (Fictional)

For more information about the hiring process visit [Staffing & Recruiting Essentials](#)

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