

POSITION DESCRIPTION

TITLE

**SALES & MARKETING
MANAGER**

EMPLOYEE NAME

HELLO

DATE OF VERSION

OCTOBER 28, 2022

DEPARTMENT PURPOSE

Describes Department's purpose in the company eg. Dime Accounting is responsible for... and committed to...

Providing relief to our customers through timely and accurate management of financial information, and producing helpful feedback and narrative.

POSITION PURPOSE

Describes Position's key purpose...

Your ultimate responsibility is to grow revenue by winning new business.



DEPARTMENT RELATIONS

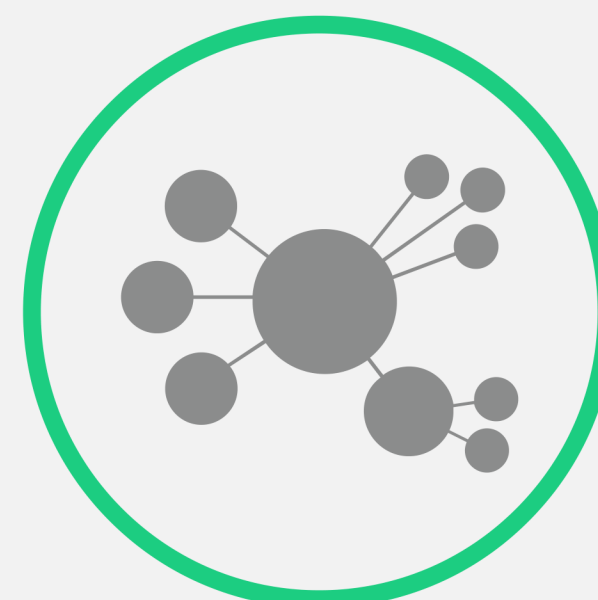
Department: Accounting, Giving

Department Head: David Kennedy

Reports to: David Kennedy

Direct Reports::

- Yes
- No



KEY RELATIONSHIPS (positions)

New Prospective Customers

Customer Success & Sales

Controllers & Accountants

Strategic Partners & Affiliates



CLASSIFICATIONS

- Exempt
- Non-Exempt



EMPLOYEE

- Full Time
- Part Time
- Hourly

TASKS & RESPONSIBILITIES



KEY RESULT AREA

DESCRIPTION OF DUTIES

STRATEGIC WORK

- Identify and pursue new target customers.
- Offer opinion on brand awareness, effectiveness and relevance.
- Identify and suggest new sales materials, systems and processes.
- Identify and suggest add-on products relevant to our customer base.
- Understand the customer's needs and our effectiveness meeting those needs and report findings to management.
- Help identify new target markets and how to pursue them.
- Find, develop and foster relationships with centers of influence.

TACTICAL WORK

- Identify new sales prospects and partnerships. Cultivate, qualify, and reach new customer markets, affiliate relationships by weekly reaching out to new prospects and documenting these interactions.
- Contact prospective customers. For prospective initiated contacts, respond within 1 business day of inquiry.
- Complete discovery call using tools and processes outlined in method documents.
- Send and Receive engagement letters and contracts.
- Maintain Sales Database using Hubspot, Teamwork, and Sharepoint (collectively "Sales Database) according to the Method docs, keep the Sales Database up to date on a daily basis.
- Follow-up and cultivate relationships with prospective customers.
- Transition new customers to implementations and controllers.
- Assist in the implementation process and touch base with the customer throughout the process to determine success.
- Weekly meeting with the President to present status on WIG's, scoreboard and whirlwind as well as weekly email status update to Executive Leadership.
- Weekly meetings with President and Accounting Managers to update operating team on prospective sales pipeline.
- Monthly Meetings with Executive Leadership to update on systems, processes, and product feedback.
- Update notes and maintain the CRM system with responses and communicate findings to accounting managers and company leadership.

OTHER

- You might be asked to perform a wide variety of tasks related to sales & marketing, operations, or clerical work. This will include working with Dime's subject matter experts, controllers & accountants to answer customer questions, and solve customer concerns or issues. Often playing the middle man between customers and controllers or accountants and perform any other related assignments or requests.
- Sell at least \$500,000 in new annualized revenue each calendar year.

KNOWLEDGE

Describes knowledge/understanding required to do the job effectively

- Church business operations and principles
- General business operations and principles
- Accounting operations and best practices
- How to read people and understand what they need
- Sales & Marketing operations and best practices



SKILLS

Lists skills required to do the job effectively

- People management
- Leadership
- Computer competency
- Strong written and verbal communication skills
- People, people, people.



REQUIREMENTS

DIME CORE VALUES

- Structured Flexibility
- Make it Better
- Try something
- Honesty over Forthright
- Simple and clear
- Consistency
- Listen before you talk
- Make everything look good
- Always help people
- Be healthy



EXPERIENCE

Describes experience required to perform the role effectively

- 4-5 years prior experience in Sales or Marketing
- Leadership & Management roles
- Church & Non-Profit work

