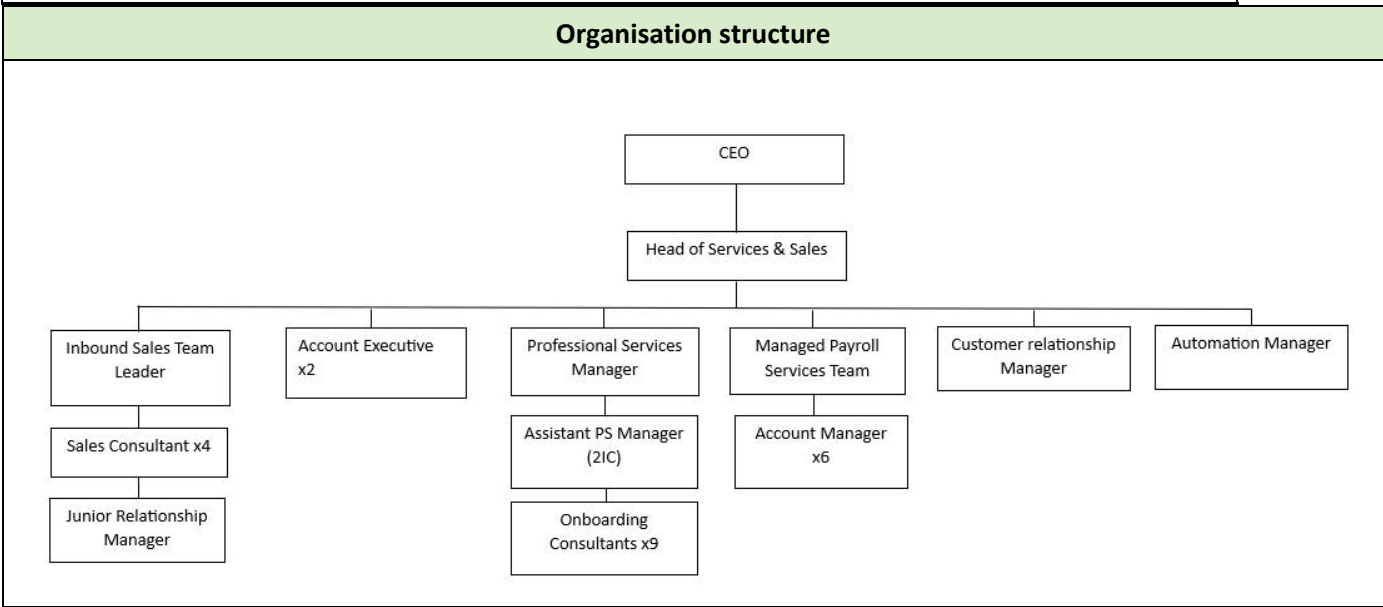




Position Description	
Job Title:	Inbound Sales Consultant
Location:	Head Office, Lower Hutt
Reporting to:	Inbound Sales Team Leader
Date:	April 2023

Purpose
The Inbound Sales Consultant is responsible for assisting the Inbound Sales Team Leader and wider sales team to convert and process inbound sales opportunities. The Inbound Sales Consultant is responsible for converting inbound enquiries and leads into processing clients and providing a positive first experience for customers joining Smartly. You will also provide support to the wider sales teams and onboarding team to maximise conversion of opportunities.



Result Area	Activities	KPI's
Lead Conversion & Processing	<ul style="list-style-type: none"> Manage all new customer and referral partner enquiries via inbound calls, emails, website, online chatbot service and other lead channels to progress these opportunities. 	<ul style="list-style-type: none"> All assigned leads responded to in timely fashion Lead conversion targets met and or exceeded

	<ul style="list-style-type: none"> • Prepare and distribute relevant material to customers and partners creating tailored proposals. • Utilise templates and latest resources from agreed central locations and recommend improvements. • Coordinate customer onboarding by assisting the Onboarding Team to collect relevant information and ensure client expectations are met. • Qualify and book appointments for BDMs and Account Executives with high value leads. 	<ul style="list-style-type: none"> • Positive feedback from NSM and BDMs. • Correct resources utilised. • NPS survey performance
Exceptional Customer Onboarding Experience	<ul style="list-style-type: none"> • Provide exceptional customer experience by providing clear guidelines and support to ensure onboarding expectations managed and customer timelines met • Ensure customer is clear on how we will assist during onboarding process and what information will need to be supplied by the customer and by when to ensure expected first pay day deadline is met 	<ul style="list-style-type: none"> • Onboarding timeframes met and customer expectations exceeded • NPS Onboarding survey
Account Mgmt. & Retention	<ul style="list-style-type: none"> • Identify each Key Account's requirements and match the Smartly feature set to maximise the value provided. • Liaise effectively with internal stakeholders to provide timely and coherent support to Key Accounts. • Cross-sell and upsell new products as they become available to maximise lead generation across the portfolio. 	<ul style="list-style-type: none"> • Client retention targets met. • Meet call cycle/Key Account coverage expectations as set with Inbound Sales Team Leader • NPS survey performance across portfolio.

Data Capture & Intelligence Gathering	<ul style="list-style-type: none"> • Accurately capture customer and sales data in D365, reviewing and checking data quality and completeness. • Complete call tracking and result reporting. • Report on relevant feedback from clients, lead conversion inhibitors and competitor activity. • Gather relevant information to ensure easy sign-up to processing transition. 	<ul style="list-style-type: none"> • All customer contact and relevant information accurately recorded in the CRM. • Call tracking and result reporting completed to agreed-upon standards within stated timeframes.
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Other Duties	<ul style="list-style-type: none"> • Carry out other duties as requested 	<ul style="list-style-type: none"> • Work completed and expectations met.
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Experience & Qualifications

Sales or customer service experience, preferably in a B2B environment

Experience working with a sales system such as Salesforce or Dynamics desirable

Time management and prioritization skills

Well-developed oral and written communication skills

Proven influencing and interpersonal relationship building skills

Effective work organisation skills with an ability to manage a wide variety of tasks

Ability to work as part of a team but also be self-directed and self-motivated

Experience and proficiency with Microsoft Office software

Key Competencies

Strong work ethic aligned to organizational values and ethics

Driven, self-motivated and proactive

Exceptional relationship building and interpersonal skills

Consultative approach to customers and stakeholders

Initiative and analytical approach to problem solving

Integrity and Trust

Customer Focus

Attention to detail