FP TRANSITIONS®

Title:	Department Coordinator – Sales/Business Development
Classification:	Full-time exempt; Onsite, Hybrid, or Remote Available
Department:	Business Development
Reports to:	Head of Business Development

Objective: Help create an efficient and effective Business Development team by providing excellent organization and administrative support to the team and department leadership.

FP Transitions Introduction: At FP Transitions, our team of more than 60 professionals helps independent financial advisory firms identify, build, and realize value. We value innovation, collaboration, client-centricity, and objectivity. We are entrusted with mission-critical moments and drive life-altering business decisions.

Role Summary: The Business Development Coordinator is the central hub for keeping your team organized and effective. Essential skills for this person are communication, organization, and critical thinking. This person provides behind-the-scenes intel to support their team and the company in staying on track to achieve their goals. They will work with Salesforce, HubSpot, OnceHub, Tableau, and other tech platforms, as adopted by leadership. This person can learn, adapt, and maximize our technology tools. The Business Development Coordinator understands the comprehensive revenue strategy and can extract data to report on progress, milestones, and forecasts as needed to support the strategy.

The Business Development Coordinator is an excellent communicator, both with company leadership and with clients, always maintaining professionalism and confidentiality. This person is excellent at anticipating needs and delivering tactical support to attain big-picture goals. While this person works closely with department leadership, they will be expected to work independently with minimal supervision and to communicate proactively should any issues arise.

Essential Functions:

- Support the Business Development team with administrative tasks, including data entry, communication, scheduling, and preparing and sending engagement agreements, proposals, etc.
- Communicate with prospects as directed by leadership.

- Learn the business development strategy and anticipate leadership needs to achieve goals.
- Monitor sales pipeline as directed by leadership, identify timely opportunities to advance sales, and prepare periodic reports to leverage sales time & effort.
- Coordinate with the Marketing and Business Intelligence teams to accurately import relevant lead data from conference sponsorships and online campaigns.
- Learn and understand website navigation and functions to facilitate troubleshooting for clients and internal team members.
- Learn and leverage our technology platforms to succeed.

Preferred knowledge, skills, and abilities:

- Solid computer skills, including MS Office and ability to use Excel & PowerPoint
- Experience with tech platforms such as Salesforce, HubSpot, Tableau, and Better Proposals is strongly preferred.
- Strong data mining, analysis, and reporting skills.
- Well-organized and detail-oriented; can coordinate over multiple time zones.
- Exceptional communication and writing skills, maintaining strict confidentiality when appropriate.
- Exceptional time-management and organizational skills.

Education and Experience:

- BSc/BA in business, communication, marketing, or related areas.
- 3+ years' experience in an administrative or sales support role is strongly preferred.
- Experience in the wealth management/financial services industry is strongly preferred.

Compensation and Benefits:

- $22-36/hour DOE, possibility for incentives related to department success.
- Company lunches, snacks, team-building events
- Onsite, hybrid, or remote work supported.
- Medical, Vision, Dental, 401k with 25% employer match.
- Company holidays (including employee's birthday) and accrued PTO.

Physical factors & working conditions: Professional office environment, remote/on-site/hybrid available as approved by manager, no travel required.