FP TRANSITIONS®

Title: Sales Representative
Classification: Full-time exempt; Onsite, Hybrid, or Remote Available
Department: Business Development
Reports to: Director of Business Development

FP Transitions Introduction:
Founded in Lake Oswego, OR, in 1999, FP Transitions is the nation's leading provider of business enhancement strategies for the financial services and wealth management industry. Our expertise extends through valuation assessment, equity management, succession planning, mergers and acquisitions marketplace and support, benchmarking analysis, continuity planning, entity formation, enterprise consulting, compensation design, and beyond.

Role Summary:
The Sales Representative identifies and nurtures new business with prospects and prior clients of FP Transitions. Conducts outbound email campaigns and follows up with call campaigns to identify opportunities for Senior Sales Specialists to hold in-depth discovery meetings and close sales. Meets targets on calls placed, leads converted, and revenue achieved.

Essential Functions:
- Solicits new business from FP's existing pipeline of warm prospects and former clients.
- Identifies prospect's needs and offers opportunities to explore FP solutions further.
- Effectively communicates the FP value proposition to generate sales demand.
- Works collaboratively with the team of Business Development Specialists to maximize lead generation, close rates, and overall revenue.
- Works collaboratively with internal partners in marketing and business intelligence to assess success rates of campaigns and messaging; recommends improvements to increase sales.
- Follows all procedures for preparing engagements, resolving issues, and submitting regular reports regarding sales, pipeline lists, forecasts, and market insights.
- Generates revenue and meets/exceeds established sales targets.

Preferred Knowledge, Skills, and Abilities:
- Cultural alignment with FP's Core Values: Collaborative, Passionate, Client-Centric, Results Oriented, and Innovative
- Experience with Salesforce, Slack, and HubSpot strongly preferred
- Effective use of LinkedIn to help build awareness and demand for FP services.
- Adept at prospecting and using effective consultative selling principles and practices
- Adept at identifying client's needs, opportunities, and threats to their status quo.
- Ability to plan and organize, set priorities in a fast-paced environment
- Persuasive communication skills: verbal, written and presentation
- Self-motivated: works well independently
- Strong problem-solving and analytical skills

- Understanding of financial market dynamics including demographics
- Professional appearance

Education and Experience:

- BSc/BA in business, communication, marketing, or related areas.
- 2+ years of business development, account executive, or sales experience is preferred
- Experience in financial services, banking, law, or other professional services encouraged
- Experience using a CRM is preferred

Compensation and Benefits:

- Total compensation is estimated to be $100,000 annually, 50-50 base salary and performance bonuses.
- Company lunches, snacks, team-building events
- Onsite, hybrid, and 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.
- On-site/Remote/hybrid available with manager approval.
- Some travel may be required.