



Sales Operations and Customer Support

This is a Regular Full-time Employment Opportunity

“Ongoing Virtual Opportunity”

What It Means by “Sharing the IFI Experience”

We are unique and some may describe us as being quirky in a fun way because we like to celebrate our differences; both personally and professionally. Things in our world are always changing, and our employees are challenged every day--either using new technologies or by the creation of perspectives through the lens of a kaleidoscope. Each day is different, and it is never the same old thing.

We offer an environment where you are continuously learning and there are opportunities for personal growth and development.

About the Career Opportunity:

You will be the glue that helps to support our marketing efforts by managing our client’s onboarding and offboarding processes. This entails working in our Salesforce database by updating contract information, ensuring clients have submitted all required information, tracking of leads and more.

This position requires someone who can multi-task, change directions quickly and has strong attention to details (we can’t let anything slip through the cracks).

Some of the general responsibilities include:

- Managing the client onboarding process including verifying all contracts are properly initiated by working with internal staff on pricing as an example, and that all contracts are properly executed by the client.
- Accurately maintaining our Salesforce database by inputting pertinent client information (e.g., terms and conditions, pricing, leads, etc.).
- Scheduling client kick-off calls with multiple members of the internal/external team using Outlook.
- Creating reports in Excel.
- Preparing written communications in Word.
- Following-up on missing documents or information that is needed to complete your assigned tasks.
- Manage the client off-boarding process including communications with the client related to outstanding terms and conditions related to the contract and any payments that may be due.
- Keep Teamwork updated as appropriate and modify existing templates as needed.
- Prepare quotes and statements of work (SoW), based on input from the internal technical team.
- Taking accurate notes during sales pipeline review meetings with the internal management team and our partners. Information garnered from these meetings will be put into the Salesforce database for future reference.
- Proactively schedule renewal reviews before the deadline date to ensure there is enough lead time to take appropriate action with the client and conduct license reviews.
- Maintain Partner placeholder meetings and review with partner admins weekly.
- Update’s sales forecast in Excel.



What Qualifications & Talents Are Needed to Be Successful in This Role?

- High School Education/Equivalent, some college preferred.
- 2 year's previous experience working in an Office Assistant capacity.
- Previous experience using Salesforce, or another type of database system is preferred, but not required.
- An ability to use all Microsoft Office products efficiently, including creating reports in Excel.
- Strong attention to details!
- An ability to pick up and learn new technologies quickly.
- You have excellent written and verbal communication skills. You make complex ideas understandable and craft requirements that are easy for multiple audiences to consume.
- You have excellent problem-solving skills, with demonstrated ability to create structure and manage ambiguity.
- You have an ability to manage multiple moving parts at a time and are highly detailed.
- You are comfortable operating in a fast-paced entrepreneurial environment.
- Ability to work well with different personalities (internally and externally).
- Self-disciplined.

Other Noteworthy Information About IFI:

Even though we are all working virtually, we continue to come up with *creative ways of having fun together*. We've by played Pub Trivia, have had live musical performances where we had to guess the artist and the name of the song, not to mention what we did this month for the holiday season where we went all out!

To celebrate the holidays in 2020, each employee was given 12-gifts and opened one each day of the week, we had a fun virtual White Elephant Gift Exchange, and we had an Ugly Sweater Contest. ***We are always looking for adventurous and innovative ways to strengthen our bonds.***

We have a ***variety of benefit programs to secure our employee's health, wellness, and financial stability.*** Including a 401-k, access to a Financial Advisor and much more!

If there is a special event in your life where you need to take off early or start later in the morning, we understand. ***Life and work should be balanced.***

We also make working remotely seamless. Before the virus, we had employees working across the US in multiple time zones and made special efforts to make them feel like they were working side-by-side with their other team members.

Did we mention, we also received an award for being one of the ***top 100 employers in 2020?*** Come and look inside our organization by reviewing us on Facebook, Instagram and of course, our home page at www.IFIprofessionals.com.

You will be surprised at how much fun working can be with a great team of talented colleagues and business leaders.