

## **Inside Account Manager Role:**

### **Description:**

Provides support to the sales team through creation of quotes, managing equipment ordering process, and updating pipeline. Order processing/entry, price quotations, information input and management. Managing opportunities in the CRM system, ensures updated accuracy of sales pipeline by updating opportunity status, or other related tasks. Includes sales activities such as following up with clients on open opportunities, in an effort to close the sale.

### **Responsibilities & Expectations:**

- Perform proactive sales activities required to achieve sales quota
- Achieve and maintain company required internal / external sales trainings, credentials, certifications and continuing education activities.
- Create, update and maintain assigned and co-assigned opportunities in company CRM System.
- Ensure all required and associated documents are attached to opportunities in the company CRM and client folders.
- Create sales quotes and proposals including services, hardware and software.
- Coordinate with internal and external sales engineering resources to ensure accuracy of the technical configurations on sales quotes.
- Coordinate with distributors and product manufacturers to obtain training on and ensure use of all available promotions to achieve the best possible gross profit on all sales orders.
- Process approved sales orders and perform all related administrative tasks.
- Prepare purchase order requests and provides purchasing all necessary information to create an accurate sales order including but not limited to promotional discounts, shipping costs, etc.
- Coordinate with distributors and shippers to coordinate shipping and delivery logistics associated with closed sales orders.
- Manage and update all pipeline quote activity
- Process returns, ensure proper credits are applied for all items that have been returned.
- Receive, document, and tag all items that have been ordered.
- Handle all logistics associated with orders such as shipping, receiving and asset lifecycle management
- Perform necessary technology solutions research with manufacturer pre-sales engineer support in order to validate correct solution configuration.
- Assist vCIO in maintaining client vCIO Technology Budget Forecast by ensuring proper coding and management of Opportunities.
- Establish, Track and maintain our manufacturer partnership status with various partners such as Microsoft, Cisco, VMware and others.

**Inside Account Manager Role: (cont.)**

**Responsibilities & Expectations: (cont.)**

- Deliver timely and accurate monthly/quarterly/annual sales projection
- Provide timely and accurate turnaround of quote requests to opportunities
- Maintaining a high knowledge level of the products and technologies that we recommend, and sell to our clients.
- Ensure timely and accurate reporting of Service Provider Subscription licensing to the various partners and distributors
- Ensure timely renewal of partnership status
- Have a can-do attitude, ability to accomplish goals and tasks assigned.

**Requirements:**

- 2-3 years' account manager experience.
- Windows suite and Outlook experience.
- Auto Task and QuoteWorks a plus.