



Position Description

Position Title:	Sales Operations Manager
Department:	Sales
Location:	Sydney
Reports to:	Sales Director
Direct Reports:	None
Key Clients / Stakeholders:	<p>Internal:</p> <ul style="list-style-type: none">• Class Sales Director• Class Sales Team• Class Marketing Team• Class Implementations Team• Class Finance Team• Other Class business stakeholders <p>External:</p> <ul style="list-style-type: none">• Class Clients• Class Suppliers
Purpose	<ul style="list-style-type: none">• To continuously improve sales productivity and effectiveness.• The Sales Operations Manager is a key point of contact between the Sales Team, Marketing, Implementations, Finance and other departments.• The Sales Operations Manager will be responsible for supporting the Sales Director with analytics, driving productivity improvements, CRM maintenance and other sales/exec support functions.
Key Responsibilities:	<ul style="list-style-type: none">• Salesforce CRM analytics and maintenance for Sales dept.• Lead management – lead tracking, allocation, reporting as needed.• Sales Team operational management – travel & logistics, diary oversight & management, event attendance coordination, expense review, sales guidelines & budget review, general query escalation, point of contact for internal team.• Sales Performance Reporting and insights – sales pack production for weekly sales and monthly Board meetings.
Knowledge, Experience and Expertise:	<p><u>Knowledge:</u> Experienced and qualified Salesforce Administrator (fluent with Lightning & Classic), best practice Sales Reporting. Experienced with CTI technology to support phone & field-based selling.</p> <p><u>Experience:</u> Experience supporting a sales team to drive improved productivity, providing executive level support and proven time-management skills.</p> <p><u>Expertise:</u> Experience working with sales teams and supporting achievement of their goals. Understanding SMSF accounting practices, understanding of the SMSF and non-SMSF investment industry is desirable. Strong internal stake-holder relationship management skills.</p>

Professional / Tertiary Qualifications:	<ul style="list-style-type: none"> • A tertiary qualification in the fields of Business, Commerce or Accounting is preferable. Formal Salesforce administration qualifications desirable.
Key Work / Behavioural Competencies:	<ul style="list-style-type: none"> • Analytical mindset. • Sales acumen. • Results orientation. • Excellent organisational and planning skills. • Collaboration. • Strong communication skills. • Administrative Management.
Compliance	<ul style="list-style-type: none"> • Contributing to health and safety at work by identifying, reporting and controlling hazards and promptly reporting any accident/incident

- This Position Description is intended to provide a general framework and a delivery mechanism for the business. The Position Description may change as our business needs evolve.
- Other duties and desired outcomes may and can arise from the workflow generated.
- In line with our expectations, all team members, where skills and knowledge allow, are expected to take on work as allocated in direct consultation with their manager or business heads.

Key Performance Indicators

Colleague satisfaction as assessed by your manager, peers and associated project and support staff – note this assessment may be performed either informally by interview or formally via survey subject to the applicable management processes in place at that time. The assessment will include:

- How effectively you execute the above responsibilities (includes pro-activeness , responsiveness and thoroughness)
- How professionally you interact and communicate with your colleagues (and clients if applicable)