

# CLIENT REVENUE MANAGER

**Instructions:** This guide will help you see examples of job profiles so that you can build some for your organization. Use this guide alongside The No B.S. Small Business Book.

## A SUCCESSFUL CLIENT REVENUE MANAGER WILL BE SOMEONE WHO...

- Thrives on creating lasting relationships through integrity, reliability, and maturity.
- Is energized by random phone calls and messages throughout the day that say, “Hey, can you hop on a Zoom call in an hour?”
- Is probably still best friends with someone from your elementary school
- Isn’t afraid to make a video of themselves
- Understands business and the importance of driving revenue for small businesses
- Communicates effectively at all levels of an organization
- Understands what it means to discern the question behind a question
- Has an unmatched drive to win. If you don’t hit a goal, you create an action plan and implement it to make sure you (and your team) win next time.
- Can own up to a mistake with confidence.
- Is agile. You can adjust and course correct with little supervision or hesitation.
- Is revenue minded. You understand that data drives decision making, and you can tell stories around data.
- Loves to sell. You understand the 2nd sale as much as you understand creating a Ritz Carlton guest experience for clients.
- Has the ability to create and execute rapid response action plans to suspected dissatisfaction or opportunity.
- Operates well under pressure and isn’t afraid of confrontation. You have excellent negotiation skills.
- Crafts written communication with ease, professionalism, and creativity.
- Is self-motivated and thrives in a results-driven environment.
- Is able to prioritize among competing tasks.
- Loves to make things better. An inefficient process drives you crazy, and you aren’t afraid to change it.
- Has a strict attention to detail while also being able to juggle many relationships, projects, and tasks.

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Manage a portfolio of clients
- Be the primary point of contact and develop lasting, productive relationships with key client stakeholders within your portfolio of clients
- Be continuously developing different ways to seize growth and recovery opportunities
- Provide an excellent client experience
- Define priorities based on impact and confidence
- Evaluate results and implement adjustments based on results
- Deliver accurate monthly results to clients
- Drive Quarterly and Annual Business Reviews

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do when you say you will do it and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You can look at reports and are able to define problems distinctly, collect data accurately, establish reliable facts, and draw valid conclusions
- You are hands-on and detail-oriented
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You make decisions with the interest of the company, supervisor and team members in mind.
- You are self-motivated to produce agreed-upon results.
- You are not late to meetings.

## SCHEDULE

The Client Revenue Manager is a full-time, W-2 team member working approximately 40 hours per week. Our core hours are 8:30 am to 5:00 pm EST on weekdays. All full-time employees are expected to be available during core hours for meetings and communication (phone, Slack, email). Scheduled meetings would include, but are not limited to, client meetings, weekly team, and weekly one-on-ones with the team director.

# ACCOUNT EXECUTIVE

## A SUCCESSFUL ACCOUNT EXECUTIVE WILL BE SOMEONE WHO...

- Has at least 3-5 years of sales experience
- Is a high-energy individual who is motivated by challenges
- Has superior command of Salesforce
- Has a strict attention to detail while also being able to juggle many relationships, projects, and tasks
- Is energized by random phone calls and messages throughout the day that say, "Hey, can you hop on a Zoom call in an hour?"
- Communicates effectively at all levels of an organization
- Has an unmatched drive to win. If you don't hit a goal, you create an action plan and implement it to make sure you (and your team) win next time.
- Operates well under pressure
- Crafts written communication with ease, professionalism, and creativity
- Is self-motivated and thrives in a results-driven environment
- Is able to prioritize among competing tasks

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Be a primary conversion closer of new MRR
- Close self-sourced SQO's (manage and own your book of business from cradle to grave)
- Create urgency in the sales pipeline by converting prospects
- Provide total visibility to VP of Growth of pipeline health
- Close economically healthy deals
- Leverage creative outreach and communication measures to drive new MRR deals month in, month out
- Client referral harvesting

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a self-starter who can work with limited direct supervision.
- You have an entrepreneurial spirit.
- You possess strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.

## SCHEDULE

An Account Executive is a full-time, W-2 team member working approximately 40 hours per week. Our core hours are 8:30 am to 5:00 pm EST on weekdays. All full-time employees are expected to be available during core hours for meetings and communication (phone, Slack, email). Scheduled meetings would include, but are not limited to, client meetings, weekly team, and weekly one-on-ones with the team director.

# BOOKKEEPER

## A SUCCESSFUL BOOKKEEPER WILL BE SOMEONE WHO...

- Has extensive (3+ years) experience with payroll, financial statements, bank reconciliation, and general bookkeeping
- Has advanced knowledge of computer software, particularly QuickBooks, Google Suite Products, and Microsoft Office.
- Has a bachelor's degree in finance, accounting, or business (preferred)

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Managing the day-to-day financial functions of the business
- Documenting transaction details
- Entering financial transactions in bookkeeping software
- Organizing financial reports
- Fact-checking accounting
- Conducting a monthly reconciliation of every bank account
- Conducting periodic reconciliations of all accounts to ensure their accuracy
- Processing all accounts receivable and payable
- Providing clerical and administrative support to management as requested
- Following GAAP
- Managing a budgeting process with the Lead & Management Teams
- Providing reports on income/expenses, margins, and 90-day cash forecast for Lead Team

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.
- You are tech-savvy and aren't afraid to learn a new platform.
- You naturally create systems/processes and aren't worn out by routine.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You make decisions with the interest of the company, supervisor, and team members in mind.
- You are self-motivated to produce agreed-upon results.
- You are not late to meetings.
- You can provide great references.

## SCHEDULE

The Bookkeeper is a full-time, W-2 employee working approximately 40 hours per week. We expect you to be available Monday through Friday, 8:30am to 5:00pm ET for meetings/communication and request you check-in at least every 2 hours during those times. Scheduled meetings would include, but not limited to, weekly All Team, weekly one-on-one with direct report, and financial reviews.

# CONTENT MANAGER

## A SUCCESSFUL CONTENT MANAGER WILL BE SOMEONE WHO...

- Understands the effect of various content mediums, how they fit the larger content strategy puzzle and fit the overall demand generation mission
- Gets in the trenches and willing to be scrappy to get projects done
- Up for expanding skill set and testing new content mediums in new channels as content marketing trends evolve (which they do, quickly)
- Understands the challenge of content marketing and the need to produce short-term results while seeing and addressing the long-term needs
- Has 5+ years of Content Marketing experience including hands-on experience producing high-level content. This role gets their hands dirty
- Comfortable with producing MQL, SQO, and MRR from your efforts to meet revenue targets
- Video production and editing experience a plus
- HubSpot and SFDC experience preferred

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Research, outline and create content that drives organic traffic and increases company thought leadership
- Create the content calendar and execute on deadlines
- Lead a content team of 2-3
- Develop 'rinse and repeat' content creation method that can be scaled up with the addition of new personnel per medium
- Collaborate on ideation of content projects with VP of Growth and other members of Demand Gen team
- Lead production of content mediums potentially including but not limited to blogs, videos, webinars, checklists/templates, ebooks, website pages, podcasts, etc.

## WHAT YOU OWN CONTINUED

(Yes, you own it, you are responsible for it, and you will crush it!)

- Work to review content effectiveness and update/merge/delete content as necessary
- Stay on top of keyword data, customer feedback, GSC, Google trends and filter all this feedback into the content strategy to adjust as needed
- Monitor and analyze content performance
- Collaborate with Digital Acquisition, Brand, and Sales Ops teams to plan and execute against quarterly goals
- Help develop reliable metrics analysis for content marketing
- Editor-in-Chief of all content produced

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a self-starter who can work with limited direct supervision.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented

## SCHEDULE

Our Content Manager is a full-time, 40 hour a week, remote (work from home) employee. We expect full-time team members to be responsive to other employees within 2 hours between 8:30am-5pm EST.



# DIRECTOR OF CLIENT RELATIONS

## A SUCCESSFUL DIRECTOR OF CLIENT RELATIONS WILL BE SOMEONE WHO...

- Has a bachelor's degree in Business, Communications, or Marketing from an accredited four-year college or university, or equivalent experience
- Has a minimum 3+ years of experience leading a team in account management, sales, customer success, or consulting
- Has proven experience leading, building, and cultivating teams and leveraging client success best practices
- Has proven ability to develop strategies, translate them into initiatives, and track successful delivery
- Possesses strong understanding of customer empathy and passion for driving success, revenue, and growth
- Demonstrates operational excellence in analytical thinking, process development and improvement, problem solving, communication, delegation and planning
- Is able to be flexible and agile in responding to evolving business priorities and dealing with ambiguity
- Is able to collaborate across the organization and with external stakeholders
- Has a demonstrated ability to communicate, present, and influence credibility effectively at all levels of the organization, including executive and C-level
- Is an excellent communicator who is able to adapt their approach based on the audience
- Has experience with reporting, analysis, and basic budgeting
- Is willing and able to address escalated client issues with speed and urgency
- Is able to define problems distinctly, collect data accurately, establish reliable facts, and draw valid conclusions.

## SCHEDULE

The Director of Client Relations is a full-time, W-2 employee working approximately 40 hours per week. Our core hours of operation are 8:30 am to 5:00 pm EST on weekdays. All full-time employees are expected to be available during core hours for meetings and communication (phone, Slack, email). Travel could include up to 12 nights per year.

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Increase client revenue retention and uncover revenue expansion opportunities
- Responsible for “how” we deliver our service from a client relationships perspective
- Provide thought leadership and organizational development
- Define and optimize our client journey
- Recruit, mentor, groom, and inspire a world-class team
- Define the vision of a red carpet experience
- Continuously measure client health and ways to improve
- Define and oversee lifecycle processes/touch points, monthly reporting and QBR process, voice of customer program, NPS, and others
- Personally manage escalations from your direct reports and follow a methodical escalation process to management
- Identify opportunities for continuous improvement
- Find ways for CRMs to deeply understand our clients objectives and become a trusted right-hand advisor
- Drive company-wide definition of ideal client
- Create company-wide client feedback loop
- Help foster company-wide culture of Client Success
- Drive execution of effective referral program

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do, when you say you will do it, and own up to when you don't.
- You are revenue-optimization minded.
- You are analytical, self-motivated, and detail-oriented.
- You have an ability to discern the unspoken signs of client satisfaction/dissatisfaction.
- You are an enthusiastic servant-leader with strong leadership skills, including coaching, team-building, and conflict resolution.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are hands-on and detail-oriented.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You make decisions with the interest of the company, supervisor and team members in mind.
- You are self-motivated to produce agreed-upon results.
- You share our values, and work in accordance with those values.

# DIRECTOR OF ENGINEERING

## A SUCCESSFUL DIRECTOR OF ENGINEERING WILL BE SOMEONE WHO...

- Has a bachelor's degree in Computer Science or related discipline
- Has 5+ years of development/engineering leadership experience, especially in a startup or smaller company
- Has experience in translating high-level business requirements into corresponding technical requirements
- Has a strong track record of successfully architecting and developing cloud-based software from the ground up
- Has a strong understanding of DevOps and automated build/testing/deployment systems
- Has strong technical capabilities combined with business acumen, great collaboration skills, and a knack for leading/mentoring teams

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- You will report to the SVP of Operations
- You will be responsible for leading the engineering team (including DevOps/Infrastructure)
- You'll both lead the team and actively participate in the engineering. You must be able to take on the unique dynamics of a player-coach role.
- It is expected that roughly half of the time will be hands-on development while the other half will be leadership/admin.
- Create the technical foundations, shape the technology infrastructure, and create development processes for a fast-paced, scaling startup
- Translate high-level business objectives and quarter-level roadmaps into actionable user stories and work tickets
- Work closely with Ops, RDT, and other leaders in the business to refine detailed requirements, build test plans, and deliver production-ready technology

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You have an ability to translate vague business requirements into actionable engineering tickets and prioritize appropriately.
- You thrive on being able to develop technical solutions to solve business problems that impede growth.
- You have a keen interest in the latest technology trends and their applications in the marketplace -- especially those needed for modern full-stack development.
- You have an entrepreneurial drive to build a new product within a rapidly growing organization.
- You desire to build a great engineering team with a strong culture.
- You believe that “perfect is the enemy of good” and have a strong bias towards action.
- You advocate for open source and are willing to buy/partner when appropriate.
- You possess a self-guided skill set, with the confidence to lead the technology organization with minimal technical guidance from the executive team.
- You do what you say you will do and own up to it when you don't.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You make decisions with the interest of the company and team members in mind.
- You are self-motivated to produce agreed-upon results.

## SCHEDULE

The Director of Engineering is a full-time, W-2 employee working approximately 40 hours per week. Our core work hours are 8:30am to 5:00pm ET and availability for meetings and communication with the team and vendors is expected during those hours. Remote work is the norm for the majority of the team; however, periodic in-person meetings will be beneficial and expected during critical periods of the technology planning and development. Travel may include up to 20 nights per year.

# DIRECTOR OF GROWTH MARKETING

## A SUCCESSFUL DIRECTOR OF GROWTH MARKETING WILL BE SOMEONE WHO...

- Has an understanding of building a content strategy and provide oversight to Content Manager and growing organic traffic
- Has a growth hacking mindset with ability to analyze channel production and make pivots based on demand channel performance
- Areas of expertise and oversight include: PPC/SEM, email marketing, marketing operations, content strategy, SEO, influencer marketing
- Worked with Hubspot and SFDC in the past
- Loves being tied directly to a revenue #
- Has successfully managed a team in the past
- Ability to hit aggressive deadlines
- Has a deep understanding and knowledge of paid media channels
- 5+ years of demand experience. This role gets their hands dirty and play front line manager, as well as strategic
- Comfortable with producing MQL, SQO, and MRR from your efforts to meet revenue targets

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Oversee both Content and Demand Teams
- Create and execute on the content calendar
- Leads production of content mediums potentially including but not limited to blogs, videos, webinars, checklists/ templates, ebooks, website pages, podcasts, etc.
- Collaborate on strategy and planning with VP of Marketing and other members of the executive team
- Help scale the Growth Marketing Team
- Manage budget and produce ROI from your teams channels
- Help develop reliable metrics analysis

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a self-starter who can work with limited direct supervision.
- You have an entrepreneurial spirit.
- You possess strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.

## SCHEDULE

Our Director of Growth Marketing is a full-time, 40 hour a week, remote (work from home) employee. We expect full-time team members to be responsive to other employees within 2 hours between 8:30am-5pm EST.

# DIRECTOR OF PEOPLE AND CULTURE

## A SUCCESSFUL DIRECTOR OF PEOPLE AND CULTURE WILL BE SOMEONE WHO...

- Develops trust and models open, candid, respectful communication and collaborative teamwork
- Demonstrates a high degree of self-awareness and commitment to personal development
- Self-starter with good time management and organizational skills
- A team-player with a willingness to win together
- Quick learner and tech savvy
- Thrives in a fast-paced, high growth, rapidly changing environment
- Strong team player in a very agile work environment

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Successfully source high-performing talent, develop and maintain a healthy pipeline of candidates to quickly grow the team
- Talent management, development and running a talent/HR system to drive employee satisfaction and employee training
- Coordinate employee training and development initiatives
- Discuss employees' career development paths with managers
- Track key HR metrics like cost per hire, revenue per employee, and retention rates
- Measure the effectiveness of our benefits programs and recommend improvements
- Assess training needs and coordinate learning and development initiatives
- Craft talent acquisition strategies to build strong pipelines for future hiring needs
- Collaborate with managers to identify future hiring needs and build job descriptions
- Perform benchmark research on compensation and benefits
- Manage the hiring process
- Develop training and onboarding material
- Act as a consultant to new hires and help them onboard
- Participate in our company's strategy regarding employee development and engagement
- Monitor HR department's budget

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do, when you say you will do it, and own up to when you don't.
- You are analytical, self-motivated, detail-oriented.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are hands-on and detail-oriented.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You make decisions with the interest of the company, supervisor and team members in mind.
- You are self-motivated to produce agreed-upon results.
- You share our values, and work in accordance with those values.

## SCHEDULE

Our Director of People and Culture is a full-time, 40 hour a week, remote (work from home) employee. We expect full-time team members to be responsive to other employees within 2 hours between 8:30am-5pm EST.



# DIRECTOR OF SALES

## A SUCCESSFUL DIRECTOR OF SALES AND CULTURE WILL BE SOMEONE WHO...

- Has 1+ years of sales management. This role gets their hands dirty and acts as a front line manager, as well as strategic
- Master of running sales cycles and outbound processes
- Has worked with SFDC, Salesloft, Zoominfo, LinkedIn Sales Navigator in the past
- Understands how to develop, implement, and execute a sales playbook across the sales organization
- Areas of expertise and oversight include coaching, training, recruiting, sourcing, and closing deals, etc
- Have an understanding of building a sales organization in a hyper-growth business

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Oversee RDR team and Sales Executives
- Drive sales and generate new revenue
- Build and maintain strong relationships with SE and RDRs
- Refine discovery and sales cycle process as necessary
- Ensure a healthy pipeline to hit growth goals
- Hire, train, and lead a team of high-performing sales reps as the company grows
- Work with internal team members to ensure successful onboarding and implementation for new clients
- Leverage CRM data to construct, forecast, and manage sales activity and drive pipeline to meet revenue targets and company goals
- Work with Sales Engineering to increase win-rates
- Ensure predictable success by defining SOPs and scalable playbook across the team
- Collaborate with marketing and CRMs to provide a consistent customer experience
- Work closely with the Leadership Team to provide input on the growth of the business and align revenue strategy with overall company objectives
- Drive the strategy of the core team and run the day-to-day operations to ensure success

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are a self-starter who can work with limited direct supervision.
- You have strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You are revenue-optimization minded.
- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a high-energy individual who is motivated by challenges.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.

# EMAIL MARKETING SPECIALIST

## A SUCCESSFUL EMAIL MARKETING SPECIALIST WILL BE SOMEONE WHO...

- Has 2-4+ years experience in marketing automation, email marketing, or demand gen
- Has experience in marketing preferred with basic understanding of the sales pipeline funnel
- Possesses strong analytical skills and ability to understand complex data sets
- Is a proficient user of Hubspot, familiarity with automation rules and triggers a plus
- Demonstrates strong planning and organizational skills, including attention to detail
- Has excellent creative copywriting and editing skills
- Is a go-getter: You're eager, resourceful, and constantly put your problem solving skills to the test and able to handle ambiguity.
- Is tech-savvy: You utilize the latest tools to make your work as efficient as possible. You have a natural curiosity for the tech industry, and want to be part of a high energy and passionate team about to make history
- Is quick: Energetic is your baseline, and you're a fast learner. You get excited about and love solving puzzles and take pride in your work
- Is a team player: You strive for greatness and know that teamwork is the way to get there. Ability to collaborate, build relationships, and drive results across teams (including remote colleagues) and at all levels of an organization

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Manage the entire email marketing strategy and programs via Hubspot— from creating and managing our email calendar programs, landing pages, campaigns, & nurture programs
- Use our strong brand voice to create engaging and effective email campaigns
- Oversee email marketing testing strategy and optimizations in order to increase funnel efficiencies and conversion rates
- Manage and optimize operations to detail the customer journey, attribution, and segmentation

## WHAT YOU OWN CONTINUED

(Yes, you own it, you are responsible for it, and you will crush it!)

- Build basic marketing analytics reporting needs and provide insights for the greater marketing team
- Ensure processes and best practices are in place to maintain the integrity and quality of our database and campaign lists
- Provide leadership in defining, mapping, and documenting key marketing processes
- Troubleshoot and QA campaigns, workflows, data issues, and other key marketing ops functions
- Quickly implement projects involving diverse & complex data relationships

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are a highly self-motivated and enthusiastic email marketer.
- You possess impeccable written and oral communication skills.
- You are incredibly organized and detail-oriented.
- You thrive managing cross-functional priorities at the same time.
- You are a self-starter who can work with limited direct supervision.
- You have strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You are revenue-optimization minded.
- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a high-energy individual who is motivated by challenges.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.

# EXECUTIVE ASSISTANT

## A SUCCESSFUL EXECUTIVE ASSISTANT WILL BE SOMEONE WHO...

- Is an effective and proactive communicator.
- Is an avid planner and never misses an appointment.
- Aggressively follows timelines and budgets.
- Proficiently multitasks several projects of equal importance.

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Organize calendars around 90-day Strategic Projects & Objectives
- Set & confirm all appointments for CEO and COS
- Schedule all personal and business travel
- Process CEO and Chief of Staff's email daily to have their email inboxes empty by 5pm every business day (This means everyone has been responded to within 1 business day, even if it means we will discuss it at a later time.)
- Coordinate details for projects related to the office of the CEO and Chief of Staff.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are precise and accurate but can go with the flow.
- You love to accomplish tasks and cross them off your to-do list.
- You thrive under structure and in a system but don't mind changing the system.
- You are proactive and continue to work to improve the process.
- You communicate well with people from all areas of life.
- You follow through and follow up on outstanding items.
- You know your way around a computer and new technologies don't scare you.
- You are considerate of other people and treat them professionally.
- You don't wait for someone to give you a to-do list because you create your own momentum.

## YOU LIKELY EMBODY THESE CHARACTERISTICS CONTINUED:

- You think ahead and through multiple scenarios to ensure details are taken care of.
- You are able to prioritize your day around the most important projects/objectives to accomplish.
- You are able to handle multiple projects at once.

## SCHEDULE

The Executive Assistant is a part-time role, working approximately 12 hours per week. While we have a flexible work environment, we do expect you to be available Monday through Friday, 8:30am to 5:00pm ET for meetings, communication, and request you check-in at least every 2 hours during those times.

# IMPLEMENTATION MANAGER

## A SUCCESSFUL IMPLEMENTATION MANAGER WILL BE SOMEONE WHO...

- Has a minimum of 3+ years of experience in leading a team in onboarding and implementation, sales, customer success, or consulting in a client facing service and technology environment
- Experience with technology implementations where system integrations were a key component
- Proven experience leading, building, and cultivating teams and leveraging onboarding and implementation best practices
- Proven ability to develop strategies, translate them into initiatives, and track successful delivery
- Strong understanding of customer empathy and passion for driving success, revenue, and growth
- Demonstrated operational excellence in analytical thinking, process development and improvement, problem solving, communication, delegation and planning
- Able to be flexible and agile in responding to evolving business priorities and dealing with ambiguity
- Able to collaborate across the organization and with external stakeholders
- Demonstrated ability to communicate, present, and influence credibility effectively at all levels of the organization, including executive and C-level
- Excellent communicator who is able to adapt their approach based on the audience
- Experience with reporting and analysis, and basic budgeting
- Ability to interact with and present to senior leadership with minimal oversight

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Define, optimize, document, and deliver our client onboarding and implementation journey
- Lead FIO team to be the best optimizers and trainers of serving our clients
- Drive a culture of continuous improvement and ideation of the onboarding and implementation process to include, but not limited to, new ways of servicing our clients through new technologies, processes, and efficiencies

## WHAT YOU OWN CONTINUED

(Yes, you own it, you are responsible for it, and you will crush it!)

- Coach, mentor, motivate, and lead team members through positive influence, action, and accountability for their assigned work
- Effectively lead staff through change management and execute on new procedures
- Be a key escalation point for staff, peer leaders, and business partners to quickly identify and handle client issues, or concerns, with limited direction from leadership
- Support the discipline of planning, organizing, and managing resourcing, tools, and technology required to successfully complete specific project goals and objectives
- Define scope, goals and deliverables in collaboration with cross functional teams, senior leadership, and other applicable stakeholders
- Estimate resources, participants, and timelines needed to achieve department goals and determine need for additional staffing resources by reviewing individual and team utilizations
- Work with business partners to forecast future volumes to ensure adequate department coverage

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do, when you say you will do it, and own up to when you don't.
- You are revenue-optimization minded.
- You are analytical, self-motivated, detail-oriented.
- You have an ability to discern the unspoken signs of client satisfaction/dissatisfaction.
- You are an enthusiastic servant-leader with strong leadership skills, including coaching, team-building, and conflict resolution.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are hands-on and detail-oriented
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You make decisions with the interest of the company, supervisor and team members in mind.
- You are self-motivated to produce agreed-upon results.
- You share our values, and work in accordance with those values.



# PARTNERSHIPS MANAGER

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Build and maintain relationships with top partners to generate new channels of revenue
- Identifying qualified partner opportunities
- Vetting for cultural and financial alignment
- Ongoing partner management
- Work with Customer Marketing & Growth Marketing teams to create co-branded assets, landing pages, and marketing calendars for key partners and customers
- Create, manage, and update contracts / agreements with strategic partners
- Identify and develop new relationships with technology and industry partners to create additional lead generation and revenue sources
- Identify value-add resources from our partners and encourage utilization from clients
- Help identify and produce monthly or quarterly partner webinars
- Help manage the Partner Relationship Management software & campaigns (PartnerStack)
- Identify and build new partner programs to expand our service offerings

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do.
- You have an attitude of constant-improvement.
- You approach life with optimism and see the good in situations and people.
- You enjoy people and are able to communicate clearly, both verbally and in writing.
- You are tech-savvy and aren't afraid to learn a new platform.
- You get energy by working with people and building professional relationships.
- You enjoy working within a system and aren't worn out by routine.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You make decisions with the interest of the client, company, and team in mind.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are self-motivated to produce agreed upon results.
- You are not late to meetings.
- You have a spirit of flexibility and you're willing and able to handle change quickly.
- You can provide great references.

## SCHEDULE

The Partnerships Manager is a full-time, W-2 employee working approximately 40 hours per week. While we have a flexible work environment, we do expect you to be available Monday through Friday, 8:30am to 5:00pm ET for meetings/communication and request you check-in at least every 2 hours during those times.

# PRODUCT PROJECT MANAGER

## A SUCCESSFUL PRODUCT PROJECT MANAGER WILL BE SOMEONE WHO...

- Is precise and accurate, but can go with the flow
- Loves to accomplish tasks and cross them off your to-do list
- Thrives under structure and in a system, but doesn't mind changing the system
- Is proactive and continues to work to improve the process
- Communicates well with people from all areas of life
- Follows through and follows up on outstanding items
- Knows their way around a computer and new technologies don't scare them
- Is considerate of other people and treats them professionally
- Doesn't wait for someone to give you a to-do list
- Is able to prioritize your day around the most important projects/objectives to accomplish
- Is able to handle multiple projects at once

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Coordinate with key stakeholders to set the strategy and assist in building the long-term vision
- Coordinate with key stakeholders to define project scope and objectives
- Coordinate with key stakeholders to prioritize projects and tasks within the projects
- Create and maintain a product/project roadmap
- Monitor progress and make adjustments as needed
- Assist in unblocking team members when they are blocked
- Measure project performance to identify areas for improvement
- Capture processes in visual form
- Assist the team in defining necessary Epics and breaking them down into stories to be worked by the team

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are a self-starter who can work with limited direct supervision.
- You have strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a high-energy individual who is motivated by challenges.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.

## SCHEDULE

The Product Project Manager is a full-time, W-2 employee working approximately 40 hours per week. While we have a flexible work environment, we do expect you to be available Monday through Friday, 8:30am to 5:00pm ET for meetings/communication and request you check-in at least every 2 hours during those times. You can expect 15-20 nights of travel per year.

# SALES DEVELOPMENT MANAGER

## A SUCCESSFUL SALES DEVELOPMENT MANAGER WILL BE SOMEONE WHO...

- Has 2-5 years of experience in a sales development role or similar market experience
- Has experience in lead management, outbound prospecting, and sales cycle management
- Has a proven ability to lead and motivate a team and feels successful when other people win
- Has experience with Salesforce, Microsoft Office & Google applications (A bonus if you are familiar with SalesLoft, ZoomInfo, LinkedIn Sales Nav, and Vidyard)
- Has a successful track record of delivering consistent sales qualified opportunities

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Each day, you will successfully help your team produce sales qualified opportunities via outbound prospecting for the Sales Executive team to close.
- Work diligently and creatively to optimize the outbound prospecting strategy utilizing video, voice messages, email, phone calls, social media, events, etc.
- Write and optimize templates and messaging to help the SDR team scale communication methods
- Experiment with new scripts and give feedback and coaching to SDRs as needed
- Create new strategies and evaluate existing ones to optimize effectiveness
- Build a social media network to expand influence and thought leadership
- Represent the company as an influencer and insight leader inside target markets
- Act as the voice of the prospect and continuously communicate factors of success into feedback loops
- Can jump in to research and assess potential prospects, make cold calls, send videos, etc.
- Monitor customer, market, and competitor prospecting activity and provide feedback, plus implement new strategies
- Do whatever it takes to help the team move SQO through the sales pipeline in collaboration with the Marketing team and Sales Executive team
- Stay on the cutting-edge of sales enablement technology to assess the most effective tools on the market that will help the team move faster and more efficiently
- Work with SEs to ensure communication loops and qualifications are being defined in a way that meets expectations and aides in closing of new MRR

## WHAT YOU OWN CONTINUED

(Yes, you own it, you are responsible for it, and you will crush it!)

- Motivates teams via meetings, one-on-ones, standups, budgeted bonuses, sprints, contests/SPIFFs
- Communicate with warmth and authority and set the example via our Slack HQs so SDRs are ready to hit the ground running each and every day

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You never say:
  - “That’s not my job.”
  - “I thought those goals were unattainable.”
  - “My team can’t find any new leads.”
  - “We didn’t hit our metrics because...”
- You have an innate drive for success and daily wins, not only yourself, but your teammates and company as well.
- You are energized by people & relationships and live by the motto “kill people with kindness”.
- You are adaptable and strive to not only win over outbound leads, but nurture inbound leads and relationships as well.
- You thrive on social media and never want to miss a good networking opportunity.
- You’re engaging on and off the camera.
- You get bored with routine and thrive in a fast-paced, rapidly changing environment.
- You love to learn new technologies and platforms.
- You are a self-starter and have an entrepreneurial spirit.
- You’re a problem solver and aren’t dependent on others to tell you how to move forward.
- You have a “figure it out” mindset.
- You likely have a 3, 5, and 10 year career plan with clear goals and objectives.
- You have experience in lead management, outbound prospecting, and sales cycle management
- You can follow direction from leadership and don’t need to be micromanaged.
- You have a high degree of self-awareness and take constructive criticism and run with it... without hesitation.
- You desire to GROW personally and professionally.

## YOU LIKELY EMBODY THESE CHARACTERISTICS CONTINUED:

- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing, and you enjoy working closely with a sales & marketing team.

## SCHEDULE

A Sales Development Manager is a work from home, full-time, W2 position. We have a flexible work environment built on autonomy and trust. Our core working hours are Monday - Friday from 8:30 AM - 5 PM EST. You are expected to be responsive to your teammates within 2 hours during our core hours, as well as respond to any prospects within 24 hours Mon - Fri. You may be required to travel up to 10 nights per year for summits and team gatherings. Travel costs will be covered and advance notice will be provided of travel dates.

# SALES ENABLEMENT MANAGER

## A SUCCESSFUL SALES ENABLEMENT MANAGER WILL BE SOMEONE WHO...

- Has sales experience as an SDR or SE
- Has advanced knowledge of Salesforce and sales automation tools
- Is able to act quickly and communicate clearly via multiple channels
- Must uphold brand integrity when communicating with clients
- Is able to multitask
- Has a strong desire to innovate and implement changes to processes and systems as necessary
- Has a proven track record for actively driving and managing the sales technology and sales pipeline
- Has both technical knowledge and sales skills

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Serve customers by identifying their needs and facilitating conversations with the SEs
- Act as the gatekeeper for booked calls to pre-qualify prospects and accelerate communication within minutes of the call confirmation in order to decrease the sales cycle from all channels
- Work with the SE to move deals through the pipeline in a timely manner by establishing the next steps and providing recommendations for the next steps and follow-up.
- Ensure that all prospects - sales communication is appropriately logged and tracked in Salesforce
- Work with SE to update sales proposals and executive summaries as necessary
- Develop best practices for sales communication and follow-up
- Contact, account, and opportunity creation and updating
- Provide total visibility of pipeline health
- Report to key stakeholders weekly of sales conversion rates, velocity, and revenue against goals
- Analyze sales data and make strategic recommendations to the leadership team
- Work with the sales team to accelerate revenue and ensure sales data integrity across the sales tech stack



## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are a self-starter who can work with limited direct supervision.
- You have strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a high-energy individual who is motivated by challenges.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.

# SALES ENGINEER

## A SUCCESSFUL SALES ENGINEER WILL BE SOMEONE WHO...

- Has advanced knowledge of Salesforce and sales automation tools
- Can communicate effectively and with enthusiasm to prospects
- Can confidently interpret and discuss data
- Is able to multitask
- Has both technical knowledge and sales skills

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Sustaining and growing the sales function
- Assist the sales team in bridging the gap between the sales process and what customers can expect once becoming a customer
- Support the sales team as the go-to subject matter expert on company processes and services
- Staying up to date with new processes and technology being used by the RDT and communicating effectively to the sales organization
- Joining sales reps on sales calls as needed to give further expertise and details to set proper expectations for prospects
- Work with Sales Ops Manager to identify gaps in Salesforce data needed by RDT team to effectively onboard new customers upon signing
- Liaison between RDT and sales
- Prevent new customers from ever saying “I didn’t know xxx”
- Help sales team understand and communicate data effectively
- Assist Sales Enablement in ramping new sales reps
- Own bridging the gap slack channel to free up RDTs time from answering sales questions

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are a self-starter who can work with limited direct supervision.
- You have strong leadership skills that align to help the company achieve quarterly and annual objectives.

## YOU LIKELY EMBODY THESE CHARACTERISTICS CONTINUED:

- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a high-energy individual who is motivated by challenges.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.

# SALES MANAGER

## A SUCCESSFUL SALES MANAGER WILL BE SOMEONE WHO...

- Has 3+ years of successful closing experience. This role gets their hands dirty and to play front line manager, as well as strategic
- Has managed a team in the past is a plus
- Has worked with SFDC, Salesloft, Gong, Seamless in the past a plus

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Drive sales and generate new revenue
- Build and maintain strong relationships with SE and RDRs
- Refine discovery and sales cycle process as necessary
- Engage with prospects to understand their unique and specific pain points and produce compelling business cases to meet their needs in conjunction with sales reps
- Ensure a healthy pipeline to hit growth goals
- Hire, train, and lead a team of high-performing sales reps as the company grows
- Work with internal team members to ensure successful onboarding and implementation for new clients
- Leverage CRM data to construct, forecast, and manage sales activity and drive pipeline to meet revenue targets and company goals
- Work with sales enablement and sales director to increase the sales cycle and win rate
- Collaborate with internal product teams and provide feedback to help shape future development
- Work closely with the Leadership Team to provide input on the growth of the business and align revenue strategy with overall company objectives

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You have an understanding of building a sales organization in a hyper-growth business.
- You understand how to develop, implement, and execute a sales playbook across the sales organization.
- Areas of expertise and oversight include coaching, training, recruiting, sourcing and closing deals, sales ops, lead routing, etc.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.
- You make decisions with the interest of the company and team members in mind.

# SENIOR ACCOUNT EXECUTIVE

## A SUCCESSFUL SENIOR ACCOUNT EXECUTIVE WILL BE SOMEONE WHO...

- Has at least 3-5 years of sales experience
- Is a high-energy individual who is motivated by challenges
- Has superior command of Salesforce
- Has a strict attention to detail while also being able to juggle many relationships, projects, and tasks
- Is energized by random phone calls and messages throughout the day that say, "Hey, can you hop on a Zoom call in an hour?"
- Communicates effectively at all levels of an organization
- Has an unmatched drive to win. If you don't hit a goal, you create an action plan and implement it to make sure you (and your team) win next time.
- Operates well under pressure
- Crafts written communication with ease, professionalism, and creativity.

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Close inbound and outbound sales opportunities at scale
- Support the SDR team by helping drive booked call metrics to supplement their volume when necessary
- Create urgency in the sales pipeline by moving prospects from Booked Call to Signed Contract to Client Launch
- Provide total visibility to VP of Growth of pipeline health
- Close economically healthy deals at all costs
- Leverage creative outreach and communication measures to drive new MRR deals month in, month out
- Work with the SDR team on new opportunities that are created so that congruence is achieved. Be the conduit so the prospect doesn't experience confusion.
- Client referral harvesting

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You are a self-starter who can work with limited direct supervision.
- You have an entrepreneurial spirit.
- You possess strong leadership skills that align to help the company achieve quarterly and annual objectives.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You are self-motivated and thrive in a results-driven environment.
- You are able to prioritize among competing tasks.

# SENIOR DIRECTOR OF STRATEGY

## A SUCCESSFUL SENIOR DIRECTOR OF STRATEGY WILL BE SOMEONE WHO...

- Is able to work well in a team-oriented and matrixed environment
- Has familiarity and experience with best-in-class strategic planning and development processes, frameworks, and tools
- Has expert critical and analytical thinking, problem solving, and presentation skills
- Has professional “polish” and a high EQ; balance of executive presence, high confidence, and humility
- Demonstrates an ability to influence and collaborate across all levels of the organization and functional areas
- Is able to synthesize detailed and complex - as well as ambiguous - inputs from a variety of sources and to iterate as required
- Is self-directed, highly motivated, and objective-driven
- Pays significant attention to detail and follow-up; high degree of personal accountability and ownership; superior organizational skills

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Support the Executive Team in developing and refreshing top-down, organization-wide strategic plan and key priorities systematically (lead the strategic planning process)
- Drive the strategic plan through the organization by acting as consultant to strategic plan leads to develop key priorities
- Ensure that detailed plans for departments/ teams are aligned with long-term vision and top-down strategic guidance
- Assist with resource availability and allocation
- along with Finance Team
- Drive accountability for our strategic priorities across the company through clear documentation, visibility, and accountability
- Identify and utilize project management software that meets the needs of our business and strategic plan
- Act as the central hub of all strategic priorities, regularly connecting with strategic plan leads to monitor progress, ensure projects are staying in line with strategic plan scopes and timelines, and summarize progress of projects



## WHAT YOU OWN CONTINUED

(Yes, you own it, you are responsible for it, and you will crush it!)

- Prepare reports for leadership regarding status of key projects
- Partner with the People & Culture team to develop a communication plan for the strategy at every table in the company (people scorecard, All Team/Management Table/Leadership Table/Executive Table agendas, etc.)
- Prepare agendas and documents for strategy planning/offsites sessions, and ultimately, ensure that our strategic planning process is executed effectively, efficiently, collaboratively, and on schedule

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are an experienced and efficient leader.
- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.
- You make decisions with the interest of the company and team members in mind.

# SENIOR PROJECT MANAGER/EXECUTIVE ASSISTANT

## A SUCCESSFUL SENIOR PROJECT MANAGER/EXECUTIVE ASSISTANT WILL BE SOMEONE WHO...

- Is an effective and proactive communicator.
- Is an avid planner and never misses an appointment.
- Aggressively follows timelines and budgets.
- Proficiently multitasks several projects of equal importance.

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Report to the CEO and Chief of Staff
- Coordinate administrative responsibilities for the CEO and Chief of Staff
- Collaborate with CEO/COSon masterminding projects and then leading the outlining and developing process
- Organize calendars around 90-day Strategic Projects & Weekly Planner
- Set & confirm all appointments for CEO and CSO
- Process CEO and Chief of Staff's email daily to have inbox at zero by 5pm every business day
- Notes from all team, management meeting and retreats are documented and distributed to the team.
- Coordinate details for projects related to the office of the CEO and Chief of Staff. Ex. strategic plan, board retreats, follow up from meetings, and assigned special projects
- Meet with staff members to take detailed ordering briefs and clarify specific requirements of each project
- Delegate project tasks based on team members' individual strengths, skill sets and experience levels
- Track project performance, specifically to analyze the successful completion of short- and long-term goals
- Meet budgetary objectives and make adjustments when necessary
- Develop comprehensive project plans to be shared with staff members or other key players
- Owner of the strategic plan and outcomes
- Gatekeeper of hiring/phone screens

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You understand the value of a minute and treat your and your team's time with that level of importance.
- You make a calendar and check it twice... three times, maybe even four.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.
- You naturally create systems/processes and aren't worn out by routine.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You are not late to meetings.
- You can provide great references.

# SENIOR VICE PRESIDENT, OPERATIONS

## A SUCCESSFUL SENIOR VICE PRESIDENT, OPERATIONS WILL BE SOMEONE WHO...

- Has proven experience as an operations leader in a fast-growing organization
- Possesses excellent organizational and leadership abilities
- Has outstanding communication and people skills
- Superior knowledge of industry's legal rules and guidelines
- In-depth knowledge of diverse business functions and principles (e.g. service delivery, integrating technology efficiencies, customer success, etc.)
- Working knowledge of data analysis and performance/operation metrics
- Aptitude in decision-making and problem-solving
- BSc/BA in business administration or relevant field; MSc/MA will be a plus

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- Formulate business strategy with others in the executive team
- Design policies that align with overall strategy
- Ensure strategic plan set by Lead team is implemented
- Set comprehensive goals for performance and growth
- Establish policies that promote company culture and vision
- Implement efficient processes and standards
- Coordinate customer service operations and find ways to ensure customer retention
- Evaluate risk and lead quality assurance efforts
- Oversee the implementation of technology solutions throughout the organization
- Oversee expenses and budgeting to help the organization optimize costs and benefits
- Lead employees to encourage maximum performance and dedication
- Evaluate performance by analyzing and interpreting data and metrics
- Write and submit reports to the CEO in all matters of importance
- Manage relationships with internal operation partners/vendors
- This role will be evaluated based on metrics like contribution margin, client satisfaction, revenue per employee, etc.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are an experienced and efficient leader.
- You thrive in a fast-paced environment and have a desire to make a positive impact.
- You take ownership for your work and the results it drives.
- You jump in head-first to meet goals, even if it requires doing work outside your job description.
- You do what you say you will do and own up to when you mess that up.
- You are responsible and self-reliant.
- You have an attitude of constant improvement.
- You approach life with optimism and see the good in situations and people.
- You are able to communicate clearly, both verbally and in writing.
- You are hands-on and detail-oriented.
- You make decisions with the interest of the company and team members in mind.

## SCHEDULE

The Senior Vice President, Operations is a work from home, full-time, W2 position. Our core working hours are Monday - Friday from 8:30 AM - 5 PM EST. You're expected to be responsive to your teammates within 2 hours during our core hours.

# REVENUE RECOVERY SPECIALIST

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- You are responsible for maintaining accurate information, communicating with our client's customers, and delivering agreed upon results of recovery efforts.
- You will learn your clients' brands and how to adapt your voice to speak to their customers.
- You will provide a focused, relentless and systematic approach to recovering failed payments.
- You will learn all of your clients technology systems...their payment processor, their CRM, their email system.
- You maintain the highest focus on accuracy.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You do what you say you will do when you say you will do it and own up to when you mess that up.
- You approach life with optimism and see the good in situations and people.
- You enjoy people and are able to communicate clearly, both verbally and in writing.
- You are tech-savvy and aren't afraid to learn a new platform.
- You thrive on routine and you probably write things down on a checklist, just so you can mark it off.
- You love working behind the scenes and knowing that you're making a difference in the lives of others.
- An inefficient process drives you crazy. You are always looking for ways to work smarter, not harder.
- You see things that others often miss. You love details and data and aren't afraid to speak up about what you find.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You can follow direction from leadership and don't need to be micromanaged.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You are self-motivated to produce agreed-upon results.
- You take constructive criticism and run with it...without hesitation. You desire to GROW personally and professionally.

## SCHEDULE

A Revenue Recovery Specialist is a work from home, full-time, W2 position. Our core working hours are Monday - Friday from 8:30 AM - 5 PM EST. To be the most successful in your role, you'll be expected to work your accounts each day and be responsive to your teammates within 2 hours during our core hours, as well as respond to your clients' customers within 24 hours. Also, if the last day of the month falls on a weekend, you will also need to work all of your accounts that day. (That only happens 2 or 3 times a year, but we like to be clear about what's expected so you aren't surprised!)

# IMPLEMENTATION SPECIALIST

## WHAT YOU OWN

(Yes, you own it, you are responsible for it, and you will crush it!)

- You are responsible for delivering a red carpet onboarding experience, with the client experience being top of mind.
- You are responsible for creating a seamless and optimized experience for each client.
- You will ensure our processes are accurately documented in our database and Salesforce so that “no question is left unanswered.”
- You will create training videos and a documented written process for each unique client that we serve.
- You will maintain the highest focus on accuracy.

## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You don't ever say, “I don't know” without also saying, “I'll figure it out!”
- Your friends and colleagues probably come to you with their technology problems.
- You are equally energized by being with people, as you are working behind the scenes. You like a balance of relationships & people, and tasks & checklists.
- You love learning new things (especially when it comes to technology).
- You're a customer service guru and know the importance a great first impression makes.
- You do what you say you will do when you say you will do it and own up to when you mess that up.
- An inefficient process drives you crazy. You are always looking for ways to work smarter, not harder.
- You see things that others often miss. You love details and data and aren't afraid to speak up about what you find.
- You are a problem solver and aren't dependent on others to tell you how to move forward.
- You can follow direction from leadership and don't need to be micromanaged.
- You are self-motivated to produce agreed-upon results.



## YOU LIKELY EMBODY THESE CHARACTERISTICS:

- You take constructive criticism and run with it...without hesitation. You desire to GROW personally and professionally.
- You approach life with optimism and see the good in situations and people.
- You enjoy people and are able to communicate clearly, both verbally and in writing.

## SCHEDULE

An Implementation Specialist is a work from home, full-time, W2 position. Our core working hours are Monday - Friday from 8:30 AM - 5 PM EST. To be the most successful in your role, you'll be expected to work your accounts each day and be responsive to your teammates within 2 hours during our core hours, as well as respond to your clients' customers within 24 hours. Also, if the last day of the month falls on a weekend, you will also need to work all of your accounts that day. (That only happens 2 or 3 times a year, but we like to be clear about what's expected so you aren't surprised!)