



JOB DESCRIPTION

Job Title: Sales Support Liaison
Location: Richmond Office
FLSA Status: Non-exempt

Reports to: VP, Client and Employee Engagement
Department: Operations

Summary Job Description

Provide support to sales and clients, serving in the role of Liaison for quotes requiring complex combinations of hardware, software, software maintenance agreements/renewals, services and/or consulting. Takes basic requirements or outlines of needs and researches them with subject matter experts, applying knowledge of each area to ask good questions and at times make suggestions to Account Executives or vendors. Working with the Account Executive/System Consultant and or vendors, document technical solutions and present to Account Executive (Client if requested by AE) for review. Follow up with customers on existing quotes and bring to closure. Relieve the Account Executive of non-direct sales activities while building the reputation of InSource as the company that works hardest to provide clients the optimal set up at the best cost (and the company that is the go-to in this arena). Work to grow knowledge to take on advanced licensing and potentially system configuration.

Make outgoing calls to clients to develop deep relationships and serve as primary point of contact for clients. Create high-level customer satisfaction within client interactions. Help develop technical and SME expertise in other employees on sales support team. Works with Sales Support team to ensure timely quoting. Support and promote company goals, initiatives, processes, & culture.

Essential Job Functions, Responsibilities & Requirements (not limited to):

- Work with internal and external areas to gather business requirements and define client solution needs.
- Research technical solutions and components, along with options and costing.
- Create proposals for both simple and highly complex technical solutions. Architect more basic and routine systems.
- Communicate regularly with clients and Account Executives; form strong comfortable client relationships. Responsible for communications associated with the quoting/selling/shipping process etc.
- Collaborate with vendor, client & internal resources to help sales and client achieve success.
- Respond to and resolve sales & client inquiries.
- Lead or assist with special projects that advance the processes and/or goals within the company
- Use databases to maintain client records, answer questions, research, and resolve issues.



Experience: (2-3 years min)

- Strong client and user interaction skills; experience working as a liaison between sales, vendors and clients is highly desired.
- Understanding (gained thru working with) and/or quoting of complex solutions involving hardware, infrastructure, software, services etc. with high degree of detail and variability
- Gathering business requirements for technical solutions and presenting via proposal and conversation with clients: translating business needs into solutions.
- Entering and maintaining data in CRM in detailed fashion
- Experience (2-5 years) working with hardware and software and the desire to increase depth of knowledge in same, while also working with Services leadership strongly desired.

Specific Skills:

- Proven excellent interpersonal skills and a proven desire to work proactively shoulder to shoulder with others to achieve success for the company.
- Confidence and comfortable making outbound and outreach calls to others.
- Must be able to initiate and nurture business relationships with Account Executives, customers and vendor partners.
- Knowledge of Wonderware solutions (ACP, Advantech, Arista, and Dell) strongly desired.
- Proficient in Microsoft Word, Outlook, Excel & CRM usage.
- Must be able to work at a fast pace and quickly learn complex and advanced technology, products, systems, and process.
- Convey ideas and facts in writing & verbally using language the recipient will best understand.
- Ability to multitask between calls, e-mails and quotes & competing priorities.
- Able to speak with confidence to various levels of professionals.
- Detail and deadline oriented.
- Interest and competence with technology.

Experience or skill considered a plus:

- Experience with NetSuite and/or Quosal.
- Interest or degree in IT or Engineering is helpful for those desiring to move into technology position or technical sales.

Supervisory Responsibility: none

Work Conditions: General office environment.

InSource is an equal opportunity employer of protected veterans and individuals with disabilities.

EEO/AA - M/F/D/V