PMA FINANCIAL NETWORK, LLC
JOB DESCRIPTION

POSITION TITLE: COORDINATOR, SALES AND RELATIONSHIP MANAGEMENT
FLSA: EXEMPT
DEPARTMENT: INVESTMENT SERVICES
LOCATION: OK
EEO CATEGORY: SALES AND SERVICE
REPORTS TO: VP, INVESTMENT SERVICES

SUMMARY

The Coordinator, Sales and Relationship Management is responsible for sales and marketing efforts of PMA products and services (including the OLAP program) for assigned school district clients and prospects in Oklahoma. This position is a remote work opportunity with expectations of travel (50% or more) to meet business needs.

ESSENTIAL FUNCTIONS

Consistently demonstrates exceptional internal and external service with clients, along with the core values: Integrity, Performance and Commitment.

Developing and maintaining new relationships with clients by establishing new accounts or increasing low balance accounts. The primary focus will be the addition of new accounts while collaborating with the team to assist existing relationships (retention).

Collaborating with team members to achieve annual goals such as new relationships, assets goals, etc.

Generating monthly productive meetings (in person or virtual) with potential clients and existing clients. This would include working closely with the client support team to provide support and materials.

Attending conferences, regional meetings and other meetings as assigned, which may include travel outside of the assigned territory.

Promoting PMA's products and services to new and existing clients via phone, in person, or virtual meetings.

Aiding leadership in identifying new business opportunities, including new markets (conferences, meetings, etc.), new partnerships (associations) or new products and services as fit.

Pipeline Management: Effectively manage the sales pipeline in Microsoft Dynamics, from lead generation to conversion, by implementing efficient tracking and reporting mechanisms. These would include Lead Goals, Account Goals, etc.

Professional Development: Invest in continuous learning and professional development to stay informed about industry/firm best practices and enhance skills in business development and relationship management.

Models, mentors, and leads colleagues\teams to develop innovative methods and approaches for efficacy.

Steward of compliance, coordinates with company staff to gather, analyze, summarize, and prepare recommendations and reports.

Attend trainings and meetings at the Naperville, IL PMA home office.

Other duties and responsibilities as assigned by management.

ACCOUNTABILITIES

Organization-wide and Line of Business Strategic Goals.

SUPERVISORY RESPONSIBILITIES

Does this job have operations supervisory responsibilities?	Yes	X No
Does this job have regulatory supervisory responsibilities?	Yes	X No
Are there subordinate supervisors reporting to this job?	Yes	X No

EDUCATIONS AND/OR EXPERIENCE

Bachelor's degree (B.A.) degree from four-year college or university; four to ten years related experience and/or training; or equivalent combination of education and experience.

Financial industry or related experience in working with the public sector is preferred.

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED

Interpersonal:
Ability to take initiative and willingness to go the extra mile for our clients.
Attention to detail.
Ability to prioritize work with many conflicting deadlines.
Ability to work well under pressure.
Ability to collaborate and problem solve with both technology and business team members.

Communication:
Excellent English communication skills, both written and verbal

LICENSES, REGISTRATIONS AND CERTIFICATIONS

Regulatory Licensures: SIE, Series 7, 63 and 50 or attainment in a reasonable timeframe as a condition of employment.

Apply at: www.pmanetwork.com/careers