

I. Job Overview:

Department: Business Development & Marketing
Reports to: Founder & CEO
Supervises: None
Hours: 9:00am - 6:00pm

Job Purpose: Responsible for managing and performing ongoing administrative support tasks to improve the efficiency and effectiveness of the CEO. Specific responsibilities include data entry of CRM system updates, preparing for sales presentations, creating proposals, creating and updating client agreements, creating pricing worksheets, answering phones as needed, as well as other miscellaneous administrative job functions. To perform executive level task and priority management all while meeting FPA's Core Values.

Additional Role(s): Responsible for performing administrative support tasks for the CEO to increase the CEO's efficiency and productivity.

II. Essential Job Results:

Duties and Responsibilities

% of time	#	Description	Tasks
75%	1.	Administrative – Sales	<ul style="list-style-type: none"> Enter and update sales tracking system Prepare sales literature packages for sales meetings Develop sales presentations Create pricing worksheets Create proposals and quotes Create and update Service Level Agreements Create and send client facing emails Document weekly sales meetings Interface with 3rd party vendors as needed
15%	2.	Administrative – CEO	<ul style="list-style-type: none"> Perform ongoing administrative support duties for the CEO Schedule meetings and calls for the CEO Assist with directing CEO's daily schedule
10%	3.	General	<ul style="list-style-type: none"> Answer incoming phone calls as needed Attend group meetings Create, use, and maintain FPA documentation Bind reports and proposals as needed

Performance Factors

- Ability to improve the efficiency and effectiveness of the CEO
- Ability to work independently with a significant "attention to detail"
- Ability to prioritize effectively and work with a sense of urgency
- Ability to manage issues and projects to consistently meet deadlines
- Excellent pro-active verbal and written communication skills
- Effectively communicates re: workflow, priorities, scheduling, and ETA's
- Consistently provides a high quality and FPA standardized work product

III. Qualifications and Specifications:

Typical Minimum Requirements

Technical Requirements:

- In depth experience and advanced capabilities in the following applications: MS-Outlook, MS-Word, MS-Excel, CRM
- Fluent in Client Service concepts
- Knowledge of basic sales assistant and executive level concepts and tactics
- High level written communication capabilities

Preferred Experience:

- Experience interacting with senior management and C-level staff
- Experience working with sales tracking and CRM business systems
- Experience developing and managing ongoing relationships with 3rd Party Vendors
- Likely successful candidate: mid-level administrative and/or sales assistant person with technology knowledge a plus

Performance Abilities:

- Professional demeanor
- Excellent interpersonal skills
- Excellent pro-active verbal and written communication skills
- Organized: Able to manage and complete multiple projects simultaneously
- Detail Oriented: Able to apply consistency throughout the work product
- Efficient: Effective at producing required results in a short amount of time
- Strong communication: both written and orally (consistent, efficient, and effective)
- Pro-active: able to note things that need to be done without being prompted and proactively address them
- Follows direction yet applies judgment and has FPA's best interests at heart
- Team member yet knows when to work independently
- Ability to communicate effectively with other professionals and firms in client related matters
- Learning agility

Physical and Other Requirements:

- Substantial periods of work utilizing a computer, monitor, keyboard, and mouse
- Must possess mobility to work in a standard office setting and to use standard office equipment, including a computer, monitor, keyboard, and mouse
- Stamina to maintain attention to detail despite interruptions
- Vision to read printed materials and a computer screen
- Hearing and speech to communicate in person and over the telephone
- Possess reliable transportation to work outside of standard work hours when needed
- Capable of lifting up to 25 pounds (from time to time)

Note: *This Job Description is not intended to describe every element of the position. From time to time, staff may be asked to perform various job related duties not listed above.*