



Internal Sales Consultant

Internal Sales Consultants (ISCs) support Salient's existing financial advisor relationships and prospect for new relationship opportunities within the advisor network. ISCs are required to cultivate and maintain client relationships by responding to client inquiries, provide ongoing communication with clients/prospects, and manage the client/prospects throughout the sales cycle, resulting in closed business. In addition, ISCs provide accountability and sales support to the designated Regional Vice President (External Wholesaler), including, but not limited to, client call backs, written follow up and lead generation. ISCs are required to meet activity targets, achieve knowledge milestones, and be team players in a fast-paced environment.

Primary Responsibilities:

- Support individual wholesalers in assigned territories to develop new sales.
- Once familiar with the product begin to be proactive on sales by implementing an agreed sales strategy with Salient's Retail Sales Team.
- Apply various sales skills to capitalize on opportunities through introduction of investment products.
- Maintain an agreed level of pro-active telephone contact with both existing and prospective customers.
- In concert with wholesaler partner, pro-actively seek new business by targeting identified the existing client base and prospective clients.
- Professionally handle telephone enquiries requesting information for products; compile accurate information on the desired products including prices from external partners.
- Achieve team and individual sales targets as set by the Management Team within the agreed time scale.
- Ensure that the external sales team are kept informed of any developments relevant to their accounts.
- Enter all contacts in the CRM within prescribed timeframe.
- Ensure that all customer complaints, issues and queries reach a successful and appropriate conclusion. Where relevant, escalate matters to the Manager.

Education & Experience:

Ideal candidates will have:

- BS/BA in business or related field.
- Minimum 1-year successful sales experience, preferably at a professional services organization.
- Strong commitment to learning- a perpetual learner
- Ability to earn essential licenses in order to sell products. Ultimately, the ISC is expected to hold Series 7 & 65 licenses in order to sell Salient products to a broad client base. Other job-related licenses/certifications are desired.



- Basic to intermediate level experience with MS Office Suite. CRM experience, i.e., Sales Force is preferred.

Technical Skills:

- Microsoft Office Suite basic to advanced skills required
- The ability to support sales by effectively understanding Salient products and continuous development of product knowledge base.
- Depth and breadth of knowledge sufficient to allow seamless movement from one region to another, one wholesaler to another.
- Strong technical and analytical skills.
- Comfortable with a competitive, upwardly mobile cultural environment
- Brings knowledge and experience to the group daily and during weekly, semiannual meetings.

Communication Skills:

- Ability to communicate complex investment information, coupled with highly developed listening skills that enable the transfer of Salient solutions to a sophisticated investments audience and/or ability to engage individuals and groups possessing various degrees of investment sophistication.
- Speaks the language of Salient sales and services, learned through experience, mentoring, on-the-job training.
- Intermediate to advanced presentation skills.
- Ability to connect with and gain the respect of colleagues, clients, and prospective clients.
- The ability to share information and knowledge with peer group.

Relationship Building/Team Skills

Ethics and Core Values:

- The ISC must have the highest ethical standards and achieve a reputation within the Salient community and industry as a highly credible sales professional.
- Cultivate Salient' s reputation as an ethical provider of investment products and services through accurate, professional interactions with clients/prospective clients.
- Conducts business and all interactions in concert with Salient core values.

Leadership Skills:

- A firm and inclusive leadership style that fosters “win-win” situations in dealings with employees, vendors, and Salient colleagues and partners.
- The leadership potential as well as an energy and passion for investment and business development/sales that would result in significant value-added to the Salient organization and their clients over the long term.



- Experience and passion to grow into a viable successor role on a career continuum.
- Strong leadership and self-management skills that nurture a culture of outstanding performance, proactive contribution with a strong focus on-and ability to exceed client expectations.
- Focused and flexible work style; a self-starter with the ability to multi-task while working proactively and independently.
- Discipline, pragmatism, and a strong work ethic.

Physical Demands:

The ISC spends extensive time on the telephone to communicate with clients. All client interactions are recorded in the Sales Force data base.

Supervisor Responsibility:

None

Travel:

Position may require limited travel up to three trips per year.

Primary Location:

Houston, TX

Schedule:

This is a full-time position. Days and hours of work are generally Monday through Friday, 8:00 a.m. to 5 p.m. Hours may vary during budgeting periods and other key business initiatives.

Contact:

Please contact Roz Davis, Senior VP of Human Resources to apply:

careers@salientpartners.com