



## Position Opening

### **Sales Rep: Employee Benefits for Community Prosperity**

**Reports to:** Program Officer

**Classification:** Full-Time, Temporary with Potential for Permanent Position

#### **ORGANIZATIONAL DESCRIPTION**

This position provides the opportunity to work for a very unique triple-bottom-line organization. One PacificCoast Foundation is 501c3 non-profit organization that owns the economic rights to a community bank – One PacificCoast Bank. This means that when the bank makes a profit, ALL of its dividends must go to the foundation. It is one of the most unique and mission-driven banks in the country.

Together, the foundation and bank research, develop and deliver innovative and fair financial products that help our communities by helping small businesses grow and create jobs, and helping low-income communities keep more of their money they earn.

Employees of the foundation get the opportunity to work in a small, flexible organization in downtown Oakland with other staff members who are excited to solve problems and make a positive change in our communities.

#### **POSITION OVERVIEW**

The Employee Benefits Sales Representative will be an employee of One PacificCoast Foundation charged with promoting a joint program of the bank and foundation; he/she will also be representing the One PacificCoast family as a whole.

We are seeking a motivated individual with leadership qualities, sales experience, and a passion for social and economic justice to join our innovative organization as an Employee Benefits Sales Representative. The goal of this position is to create partnerships with employers to offer our newly launched community financial product: the Pal loan. The Pal loan is one of the foundation's new pilot programs designed to provide an alternative to predatory and unfair products. It is an employee assistance loan that offers people a way to deal with a financial emergency and then pay back in small amounts over time. The program also includes savings, credit building and financial tips and tools to help borrowers with long term financial stability.

This is a sales position with a community development twist. The Employee Benefits Sales Representative will work with other foundation staff to sign employers on to our program. The employers do not need to purchase this product or pay to offer this product at their workplace; however, they do need to take time to adopt and manage the program, which requires of the salesperson expertise in clear communication and establishing the need, as well as a passion for the program.

This is an inspiring project and a fun job for some who likes to talk to people: a wonderful way to use your sales skills for the greater good!

## **POSITION LENGTH AND EXPECTATIONS**

This is a temporary position, tasked with working with other staff to sign up at least 50 employer partners over the next several months. The target market is employers with 100 or more employees, focusing on the Bay Area but also extending throughout California, Washington and Oregon, where our bank operates.

## **THE EMPLOYEE BENEFITS SALES REPRESENTATIVE WILL**

- Learn the Pal program intimately and establish a belief in the program goals and features
- Meet and build rapport with Executive Directors, CEOs, HR managers and other decision makers in local companies and organizations; he/she will be responsible for tenaciously following up with these busy individuals to gain agreement and join the program.
- Understand and articulate to clients, prospects and community members the mission of One PacificCoast Foundation and Bank; and at all times represent One PacificCoast Foundation and Bank in an ethical and professional manner.
- Be responsible for day-to-day client relationship and sales/business development efforts that will result in meeting and/or exceeding individual performance goals and achieving the program's growth objective.
- Work in a collaborative manner with all One PacificCoast Foundation Bank team members; and provide exceptional service and solution to existing and prospective Pal partner employers.
- Maintain a record of all sales and relationship management activities through the use of the foundation's client management and internal communication systems, including Salesforce.

## **PRIMARY DUTIES AND RESPONSIBILITIES**

### **Get To Know the Organization, Program, Product, and Position Goals**

- Develop a clear understanding of and belief in the community goals of the Pal program and its ability to achieve them.
- Have an understanding of the foundation's plans and goals regarding program growth, and his/her individual partner relationship acquisition goal.

### **Acquire New Partnerships**

- Focus daily activities on partner development efforts with clients and prospects towards achieving these individual goals.
- Find and develop prospects through networking, referrals, cold calling, business development through support organizations, direct selling, etc.
- Create new partner relationships by developing a target list and pursuing each prospect in a determined and systematic fashion.
- Spend a minimum of 50% of time in the field, calling on prospective partners, developing relationships and uncovering new banking opportunities.
- Meet or exceed annual business plan as measured by employers signed up and number of employees at each employer.
- Maintain prescribed weekly activity levels.
- Attend all required community and business related events to network and market the Pal loan product.

### **Train Employer Partners and Their Employees**

- Conduct 1-on-1 and small group trainings with employers on the Pal program
- Conduct orientation presentations with small and large groups of employees

### **Maintain a High Level of Service and Effectiveness**

- Maintain a record of planned and completed calling and outreach activity; results of partner development efforts, new relationships and follow-up efforts through established foundation information systems – Salesforce and Outlook
- Work closely with the Program Officer and Executive Director to ensure all partnership agreements, trainings, and orientations are processed in a timely manner; and keep the partner duly informed throughout the process.
- Attend and participate in staff meetings to review goals, objectives and results, obstacles and potential solutions.
- Share best practices and successes in order to improve service, processes, procedures and product offerings.

### **Represent the Organization, Maintain its Reputation, and Deepen Relationships**

- Strengthen the foundation's partnerships by talking about the organization's mission, the bank, and its products and programs.
- When relevant, understand and abide by all relevant banking regulations and regulatory compliance procedures.
- When relevant, follow established procedures and processes of One PacificCoast Bank to ensure the bank's overall compliance.

### **Perform Other Tasks as Requested**

### **QUALIFICATIONS & EXPERIENCE**

Required:

Applicants without these qualifications and experience WILL NOT be considered for this position:

- Bachelor's degree (B. A. or B. S.) from a four-year college or university
- Minimum of 3 years relevant sales experience
- Experience (volunteer or paid) in community development, economic development, advocacy or activism

Preferred:

- Sales experience in Employee Benefits, Employee Assistance, financial services or similar.

## **SKILLS AND ABILITIES**

### **Proven Sales and Business Development Skills**

- Established track record of sales and relationship development; disciplined use of sales tools for tracking opportunities, calling efforts, and client requests.
- Proficient in Microsoft Office related software and Salesforce or other established Client Management System (CSM)

### **Clear Personal Orientation Toward Social and Economic Justice and/or Socially-Responsible Business**

- Familiarity and true understanding of the needs and issues of living paycheck to paycheck
- Desire to help eliminate inequities and provide alternatives to usurious and predatory products
- Ability to connect with people of all income levels, races, backgrounds, and job positions

### **Demonstrated Focus on Customer Service and Relationships:**

- Highly organized and able to demonstrate self-initiative; timely response to opportunities and client requests;

### **Excellent Communication Skills**

- Interpersonal - Articulate and consistent in written / verbal communications with colleagues, clients, prospects and community members; demonstrates self-motivation and positive energy; able to work productively and positively with colleagues in a results oriented professional setting.
- Public presentation – Ability and desire to present clearly and effectively to large groups of varying backgrounds; ability to explain abstract concepts, listen to objections and provide with thoughtful, constructive responses
- Networking - Outgoing and interested in talking to people and initiating conversations
- Spanish – Spanish language skills a plus

### **Acceptable driving record**

## **WORK ENVIRONMENT**

This position includes work in an office environment at a desk on computers as well as travelling locally via the employee's car and public transportation as needed to various locations to meet with potential clients and make presentations. Will require attendance at evening events on occasion.

## **COMPENSATION**

Commensurate with experience

## **EQUAL OPPORTUNITY**

One PacificCoast Foundation is an Equal Opportunity Employer

## **HOW TO APPLY**

Please send your resume and cover letter to Erin Kilmer-Neel at [ekilmer@onepcf.org](mailto:ekilmer@onepcf.org)