

# JOB CODES AND POSITION DESCRIPTIONS

## **Sales Management** *(page 1)*

- Top Sales Executive
- International Sales Manager
- General Sales Manager
- Sales Manager
- District Sales Manager
- Sales Trainer

## **Outside Sales** *(page 2)*

- Field Sales Supervisor
- National Accounts Manager
- Sales Engineer
- Sales Representative / Account Executive – Senior (Outside)
- Sales Representative / Account Executive (Outside)
- Sales Representative – Junior (Outside)
- Sales Trainee (Outside)

## **Inside Sales** *(page 3)*

- Telephone Sales Representative / Inside Sales Representative
- Order Processing Supervisor
- Telephone Order Processing Representative

## **Customer Services** *(page 4)*

- Customer Service Manager
- Customer Service Supervisor
- Customer Service Representative III (Technical Advisor)
- Customer Service Representative II (Experienced)
- Customer Service Representative I (Entry Level)

Note: This survey is designed to gather data on sales positions that are compensated in one of six different ways. Marketing positions are purposely left off this survey for this reason. Survey data on marketing positions may be found in your association's surveys.

# SALES MANAGEMENT POSITIONS

## Job Code

### 10 TOP SALES EXECUTIVE

Generally reports to President or Executive V.P. level, may be called Vice President of Sales, Vice President of Sales and Marketing, Director of Sales, etc. Responsible for the overall management and direction of the sales functions and the entire range of sales planning and development, sales promotion and sales activities of the organizational unit. Formulates, recommends, and implements policies and programs in the areas of forecasting, sales, pricing, marketing and product or service acceptance research, and related activities. May also have responsibility for marketing programs, customer relations or advertising.

**NOTE:** *This is an executive level position. Do not report your highest earning sales rep in this position. Also, do not report Presidents or Owners of smaller companies that may perform sales duties.*

### 20 INTERNATIONAL SALES MANAGER

Reports to top sales executive or directly to President or Executive V.P., may be called International Sales Manager, V.P. of International Sales, etc. Responsible for establishing and maintaining sales outside of the United States. Establishes intercontinental dealer-sales organizations, distribution channels and service arrangements. Formulates sales objectives, policies and advertising programs designed to achieve maximum sales volume and profit goals. Establishes an effective sales organization and develop programs to promote international sales and the company's business image. May prepare sales forecasts and operating budget proposals; approve conditions of sales when not in concert with regularly applied policies.

### 30 GENERAL SALES MANAGER

Reports to top sales executive, may be called General Sales Manager, Vice President of Sales, etc. Responsible for management and direction of field sales, sales manager and/or sales supervisory personnel. Generally provides direction, counsel, and guidance for plans in marketing, advertising, sales promotion, sales training, etc. Implements sales policies and ensures communication of new products or services, variations and changes, and sales promotion and activities of a division or unit. May be responsible for creating and implementing sales / marketing programs.

### 50 SALES MANAGER

Reports to second level sales manager or top sales executive, may be called Regional Sales Manager, Territory Sales Manager, Product or Brand Sales Manager, etc. Responsible for management and direction of a large segment of the overall sales volume. Direct staffing, training, and performance evaluations of Sales Reps, Inside Sales Reps, or Manufacturing Reps to develop and control sales program. Coordinates sales distribution by establishing sales territories, quotas, and goals, and advises dealers and distributors concerning sales and advertising techniques. Analyzes sales statistics to formulate policy and promote sales. Reviews market analyses to determine customer needs, volume potential, price schedules and discount rates.

### 60 DISTRICT SALES MANAGER

Reports to second level sales manager or regional sales manager. Responsible for managing the sale of products and/or services in a district. Directs staffing, training, and performance evaluations of assigned sales reps, inside sales reps, manufacturing reps and/or administrative office personnel. Develops relationships with local dealers or other distributors. Analyzes sales volume and monitors competitor activities in the district.

### 70 SALES TRAINER

Develops and administers sales training programs to the organization's sales trainees and sales personnel. Presents established and effective sales training methods, techniques, and ideas. Schedules and introduces presentations by internal or outside lecturers, motivational speakers, and sales or product specialists. Reports on progress of sales trainees and sales personnel. Assists in developing new training courses associated with the introduction of new products or services.

**FIELD SALES SUPERVISOR** – see Outside Sales Positions, page 2.

**NATIONAL ACCOUNTS MANAGER** – see Outside Sales Positions, page 2.

# OUTSIDE SALES POSITIONS

## Job Code

### 100 FIELD SALES SUPERVISOR

Supervises the training and assignments of the field sales personnel in one or more territories. Directs sales campaigns in new territories, new industries or with new products or services. Provides assistance to Sales Representatives in the promotion of new major accounts. Coordinates and assists with the technical engineering services to determine customers' needs. Supervises the development of quotations, installations, warranty service obligations and various details to ensure conformance with company marketing policies. Investigates major account warranty claims and ensure appropriate services and resolution of complaints. Conducts sales staff meetings to ensure current knowledge of sales promotion and advertising programs, new products or services, marketing polices, etc. Evaluates orders, sales activity reports, expense accounts, etc., and develops recommendations relative to sales techniques, programs, etc.

### 110 NATIONAL ACCOUNTS MANAGER

Reports to top sales executive or second level sales manager. Develops and implements national sales strategies for increasing sales and profits through national customers. Manages only national or major (key) accounts. Calls on national accounts, presents sales material and follows up on sales service.

### 120 SALES ENGINEER

Promotes the sale of company products or services requiring knowledge of engineering principles. Serves as liaison between the customer and the company on engineering matters regarding product application, sales, installation and services. Examines and analyzes customers' needs, prepare specifications, design modifications, recommendations, etc. pertinent to the proposed installation. May take charge of installation and servicing of products where engineering is required.

### 130 SALES REPRESENTATIVE / ACCOUNT EXECUTIVE – SENIOR (OUTSIDE SALES)

Performs field promotional work to sell and develop new business. May include work with current major accounts, development of new territories, new industries, or with customers where the full market potential or product acceptance has not been established. Demonstrates products / services and provides assistance in the best application to the product. Coordinates company technical engineering services to determine customers' needs. Prepares price quotations, terms of sales, delivery dates, etc., and writes orders subject to company policy. Investigates product / service warranty claims and ensures resolution of customer complaints following marketing policies. Develops data relative to marketing trends, competitive products and pricing, and submits marketing reports to management. As required, prepares and submits reports on sales and marketing activities. Trains, instructs and orients new personnel and trainees.

### 150 SALES REPRESENTATIVE / ACCOUNT EXECUTIVE (OUTSIDE SALES)

Performs field promotional work to sell and develop new business accounts. Usually assigned to established territories or industries where company product lines are accepted. Demonstrates products / services and provides assistance in the best application of the product. May coordinate company technical engineering services to determine customers' needs. Subject to company approval, quotes prices, terms of sales, delivery dates, etc. Investigates product / service warranty claims and ensures resolution of customer complaints following marketing policies. As required, informs the company relative to marketing trends, competitive products and pricing. Completes required activity and expense reports.

### 160 SALES REPRESENTATIVE - JUNIOR (OUTSIDE SALES) May be called Junior Account Executive.

Under the supervision of the Sales Supervisor or Sales Representative - Senior, performs field promotional work to obtain sales in an assigned territory where the company and product line are established. May canvas out prospective new accounts. Demonstrates products / services and assists in the selection of products / services most applicable to customers' needs. Demonstrates and familiarizes established accounts with new products / services and developments. Quotes prices, terms, delivery dates, etc. on new or repeat orders subject to the approval of company sales supervisor. May investigate and report on warranty claims and complaints. Prepares periodic activity and expense reports.

### 170 SALES TRAINEE (OUTSIDE SALES)

Attends company training sessions to learn product promotional and selling techniques, the company's marketing and sales policies and to become familiar with the company's product / service lines as they relate to the purpose, basic design, models, etc. Upon successful completion of the training program, usually assigned to a Senior Sales Representative or Sales Supervisor as a Junior Sales Representative to acquire actual field selling experience before assignment to a sales area or territory.

# INSIDE SALES POSITIONS

## Job Code

### **200 TELEPHONE SALES REPRESENTATIVE / INSIDE SALES REPRESENTATIVE**

Experienced telephone sales representative sometimes called In-house Sales Representative. Incumbents are required to have strong communications skills and product/service knowledge. Duties include selling product or services to existing and new accounts using the telephone, e-mail, or mail as the primary media for contact and negotiation. Incumbents may partner with outside sales staff to serve larger accounts. **Do not report outbound telemarketers or telephone order takers here.**

### **210 ORDER PROCESSING SUPERVISOR**

Supervisor in charge of order processing, typically requiring a two year degree in business and 3+ years of order processing experience, or equivalent. Responsible for managing non-exempt order processing staff. Specific tasks performed in the department include receiving orders by mail, telephone, fax, internet, city desk or direct sales staff and processing orders to the point of authorizing order fulfillment. Verifies credit, records payment receipts, processes credit card payments, quotes prices, and verifies product availability. Forwards processed orders to the proper department or vendor for fulfillment to a designated client and address.

### **220 TELEPHONE ORDER PROCESSING REPRESENTATIVE**

Inbound order taker requiring good verbal skills and the ability to accurately enter order information in the order management system. Typically requires a high school education or GED and less than one year of related experience, or equivalent. Incumbents may inform callers of product availability and pricing. Generally callers are predisposed to making a purchase or issuing an order when they call.

# CUSTOMER SERVICE POSITIONS

## Job Code

### **300 CUSTOMER SERVICE MANAGER**

Manager of a customer service function, typically requiring a bachelor's degree with 5+ years of experience, or equivalent. Develops and recommends customer service policies and procedures and seeks senior management approval when needed. Applies experience and judgment in the interpretation and application of direction established by senior management. Issues of major impact or technical complexity are researched and presented to upper management or referred to the appropriate internal experts for resolution. Typical customer questions are focused on account status, technical product application, service information, pricing or adjustments. Manages department staff and budget.

### **310 CUSTOMER SERVICE SUPERVISOR**

Supervisor of a customer service function, typically requiring an associate's degree with 5+ years of experience, or equivalent. The incumbent fields the most technical or complex service questions from customers and applies experience and judgment in the interpretation and application of guidelines established by senior management. Issues of major impact or technical complexity are researched and presented to upper management or referred to the appropriate internal experts for resolution. Typical customer questions are focused on account status, technical product application, service information, pricing or adjustments. Assists with employee selection and reviews employee performance.

**Do not report working supervisors or leads, where a majority of time is spent performing hands-on work of the department.**

### **320 CUSTOMER SERVICE REPRESENTATIVE III (TECHNICAL ADVISOR)**

Advanced level of customer service work, typically requiring a bachelor's degree with 2+ years of experience, or equivalent. Handles the more technical or complex service questions from customers and applies judgment in resolving service, warranty or technical problems falling within established limits of authority and knowledge. Issues of greater impact or technical complexity are researched and presented to management or referred to the appropriate internal experts for resolution. Typical customer questions are focused on account status, technical product application or service information, pricing or adjustments. May provide work direction to others.

### **330 CUSTOMER SERVICE REPRESENTATIVE II (EXPERIENCED)**

Experienced level of customer service work, typically requiring reading, communication, math and problem solving skills equivalent to a high school education or GED and 2+ years of training and experience. Incumbents receive questions from customers and follow established procedures to provide answers or refer calls to appropriate staff. Typical questions are focused on order status, product information, account status, pricing, product or service. Incumbents have limited supervision.

Report four-year degree level customer service professionals, with higher levels of authority and technical knowledge requirements, in Customer Service Representative III (Technical Advisor) position above.

### **350 CUSTOMER SERVICE REPRESENTATIVE I (ENTRY LEVEL)**

First level of customer service work, typically requiring reading, communication, math and problem solving skills equivalent to a high school education or GED and no previous experience. Incumbents receive questions from customers and follow established procedures to provide answers or refer calls to appropriate staff. Typical questions are focused on order status, product information, account status, pricing, product or service. Incumbents follow established procedures and have readily available supervision.