

Design and Sales Administrator

Reports to: Kim Serafiim

Supports: LuAnn, Kim, Rich, JC

\$33k-\$42k

Sales Administrator: provides administrative support to the sales team. They perform a number of duties focusing on customer satisfaction and moving the sales to a successful close. They schedule appointments, develop sales proposals, follow up on sales calls, help make sales, process orders, handle questions from vendors on sale, track and monitor sales..

Assist the sales person to see the sale through to completion.
You are a team.

Evaluation:

- a. supervisor
- b. sales representative feedback
- c. customer feedback
- d. quality and accuracy

Essential Functions

The following statements are intended to describe the general nature and level of work. Other duties may be assigned.

Capture information at sales appointment

1. Client Home Visits / Outside Sales and Inside Sales – cross-trained
2. All relevant information from initial sales appointment, product specifications, sampling, memo's sent to client, gathering all pricing for the project, Documenting Clients measurements, information for the order
3. Responsible for creating action items, identifying action items and taking action
4. Drafting proposal, review with salesperson
5. Takes initial inquiry call
 - a. Builds rapport and develops relationship with new customer
 - b. Sets appointment with sales person
 - c. Asks their needs- information
 - d. Enters customer information into the computer
 - e. Conveys any pertinent information in the notes section of the appointment
 - f. Gathers any samples that the sales person should have
 - g. You will work with me and sales representative

Gather pricing for projects

Create sales proposals

- h. Take customer notes and create sales proposals

Big Bullet - Update SPS as needed

Liaison for order process –

- Factory communications
 - Process invoices for all sales transactions
 - Check data accuracy in orders and invoices
-
- i. Check vendor pricing
 - j. Contact customer to obtain missing information or answer queries
 - k. Ensure proposal is accurate
 - l. Discuss any inconsistencies or questions with sales person
 - m. Gather information from vendors (e.g. yards of fabric)
-
- 6. Process orders via email or phone (when sales representative direct)
 - a. 20 key items prepared to order
 - 7. Communicate important feedback from customers internally
 - 8. Liaise with the Logistics department to ensure timely deliveries
 - 9. Make sure that all pertinent information an installer needs to know (e.g notes from meetings, photographs from project, instructions from sales person, pub docs) makes it to the installation packet.

Sales Reporting and Records

- 10. Develop monthly sales reports
- 11. Maintain and update sales and customer records
- 12. Ensure sales targets are met and report any deviations
- 13. Stay up-to-date with new products and features
- 14. Supporting the sales force with general operations to help reach the team's objectives.
- 15. Taking phone calls from customers.
- 16. Communicating internally important feedback from customers.

Accountability

- 1. Positive internal and external relationships (employees, customers, and vendors)
- 2. Teamwork with co-workers
- 3. Reliable and consistent attendance and punctuality
- 4. Timely and accurate work product

5. Professional appearance
6. Perform all duties in a manner consistent with Window Works policies, procedures and values

Company Goals

For LuAnn only: The average annual salary of a sales administrator is between \$33,086 and \$48,469, according to January 2021 data from Payscale.com. Additionally, sales administrators earn average annual bonuses of 1.5 to 5 percent and commissions of 15 to 25 percent per year. Average: **\$41,045 national average 8/2018**; FYI – another role I see is: Sales Administrative Assistant \$38,263 average