



## **Relationship & Sales Support Manager**

### **Job Brief**

This position requires professional experience in the areas of client relationship management and marketing to drive new business opportunities, particularly in dealing with business to business interactions at companies with varying levels of staff and business development. A knowledge of trust law and regulations as well as funeral and cemetery pre-need law is beneficial. Requires an understanding of business development methods, sales & marketing strategies, investment management, knowledge of tax considerations, and familiarity with the internal policies and procedures of a bank trust department. This position is responsible for proactive account management and organizing and executing sales initiatives to support the entire relationship management team, as well as growth of the business through increased services with existing customers and identifying and onboarding new business opportunities. A successful Relationship & Marketing Manager will demonstrate effective teamwork and leadership skills, as well as a problem-solving attitude.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Act as a client relationship manager and liaison between customers, tax, accounting, legal and operations personnel. Strong interpersonal skills are required. Travel as required.
- Coordinate all ClearPoint industry conventions and events and act as a ClearPoint representative as needed at conventions.
- Work with the sales team in cultivating and capturing new business opportunities, both through expanding existing and bringing in new relationships.
- Work all members of the sales team to develop and promote sales campaigns, supporting documents, presentations and collateral for use with prospects and at industry events and any other marketing related duties as needed to support the strategic sales goals.
- Develop a solid understanding of ClearPoint's business and its competitors, providing insight to Senior Management and the Trust Administration team.
- Work with Director of Trust Administration & Marketing to ensure that all business development related marketing materials and activities align with the ClearPoint brand standards and overall marketing strategy.
- Work, in conjunction with Trust Administrators, with auditors and state regulators to facilitate required examinations of customer accounts.
- Work with Investment staff to conduct regular investment reviews and lead discussions with clients.

### **REQUIREMENTS**

- Four-year college degree in related field required.
- Five to seven years related experience or equivalent combination of education and experience.
- Knowledge of investments with the ability to discuss and make recommendations to customers.
- Demonstrated sales and relationship management skills, problem solving, decision making and communication skills, both written and spoken.
- Strong organizational and project management skills, experience coordinating events a plus
- Continuous Improvement mindset. Must take initiative to address issues proactively.