



**Title:** Business Development Consultant  
**Classification:** Full-time exempt; Remote from central or eastern time zone  
**Department:** Business Development  
**Reports to:** Director of Business Development

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**Role Summary:**

The Business Development Consultant identifies and nurtures leads and prospects into new client engagements; upselling existing and former clients; uncovers advisor needs and offers different solutions that help advisors achieve their business goals; meets sales metrics; closes business.

**Essential Functions:**

- Solicits new business from FP's existing pipeline of warm prospects and former clients.
- Identifies prospect's needs and offers opportunities to explore FP solutions further.
- Effectively communicates the FP value proposition to generate sales demand.
- Works collaboratively with the team of Business Development Associates to maximize lead generation, close rates, and overall revenue.
- Works collaboratively with internal partners in marketing and business intelligence to assess success rates of campaigns and messaging; recommends improvements to increase sales.
- Follows all procedures for preparing engagements, resolving issues, and submitting regular reports regarding sales, pipeline lists, forecasts, and market insights.
- Generates revenue and meets/exceeds established sales targets.
- Lead Generator: identify and generate leads through inbound channels (web or direct contact), prospect inquiries, warm-calling, networking, and industry events.
- Relationship Builder: build and maintain strong relationships with potential and existing clients, partners, and centers of influence to promote the organization's services.
- Detective: uncover and accurately identify prospects' state and unstated needs based on their fact pattern and statements; offer solutions and alternative approaches; connect their needs with our services.
- Learner: master the subject matter expertise of the company's niche
- Educator: deliver value through curated content, helping the prospect to realize the need to act, i.e. "Why make a change to the status quo? Why now? Why FP Transitions?"
- Record Keeper: record appropriate client details in CRM and lead to an exceptional client experience providing vital details for service departments to execute on the client needs; create and record sales opportunities with prospective clients.
- Salesperson: efficiently manages their pipeline of opportunities and consistently closes new business.
- Industry Expert: be a student of the industry and our services; deliver content about our services and solutions through presentations to prospects via Zoom, industry conferences and events.
- Negotiator: exhibit excellent negotiation skills to close deals in a timely and profitable manner.



- Collaborator: work closely with internal departments such as marketing, business intelligence, and service delivery teams to ensure that the organization delivers an exceptional client experience.
- Analyst: analyze pipeline, sales data, market trends, and other business metrics to identify areas of improvement and to optimize sales and marketing strategies.

**Preferred Knowledge, Skills, and Abilities:**

- Experience with Salesforce, Slack, and HubSpot strongly preferred
- Effective use of LinkedIn and other social media platforms to help build awareness and demand for FP services.
- Adept at prospecting and using effective consultative selling principles and practices
- Adept at identifying client's needs, opportunities, and threats to their status quo.
- Ability to plan and organize, set priorities in a fast-paced environment
- Persuasive communication skills: verbal, written and presentation
- Self-motivated: works well independently
- Strong problem-solving and analytical skills
- Understanding of financial market dynamics including demographics

**Education and Experience:**

- Experience in financial services required, preferably with independent financial advisors
- 4+ years of business development, account executive, or sales experience is preferred
- BSc/BA in business, finance, psychology, communication, marketing, or related areas.
- Demonstrable history of achieving sales results

**Compensation and Benefits:**

- \$75,000-\$105,000/year base compensation and uncapped, variable commission structure for total target compensation from \$150,000 to \$200,000 plus.
- Medical, Dental, Vision, Life, Short & Long-term Disability, 401k with 25% employer match.
- Company lunches, snacks, and team building events.
- Company holidays (including employee's birthday) and accrued PTO.

**Physical Factors & Working Conditions:**

- Some travel may be required. Business Development Consultants will travel periodically for conferences and trade shows and to the Portland home office (estimated 3-6 trips per year)

