



## Position Description

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| <b>Position Title:</b>                      | <b>Inside-Sales Client Manager</b>   |
| <b>Department:</b>                          | Sales  |
| <b>Location:</b>                            | Sydney   |
| <b>Reports to:</b>                          | Sales Director   |
| <b>Direct Reports:</b>                      | None   |
| <b>Key Clients / Stakeholders:</b>          | <p><b>Internal:</b></p> <ul style="list-style-type: none"><li>• Class Sales Team</li><li>• Class Implementations Team</li><li>• Class Marketing Team</li><li>• Class Support Team</li><li>• Other Class business stakeholders</li></ul> <p><b>External:</b></p> <ul style="list-style-type: none"><li>• Accountants in Public Practice</li><li>• Financial Planners</li><li>• Financial Advisors</li></ul>   |
| <b>Purpose</b>                              | <ul style="list-style-type: none"><li>• To drive phone-based sales of Class' cloud-based products primarily amongst Single-Partner Accounting Firms in Public Practice.</li><li>• Communicating Class' value proposition to accountants and others in the Financial Services industry.</li><li>• Build the knowledge of clients already on Class platform to drive adoption of new features.</li><li>• To ensure that at all times the long-term, holistic relationship between Class and these clients is nurtured and healthy.</li></ul>   |
| <b>Key Responsibilities:</b>                | <ul style="list-style-type: none"><li>• To increase Class market-share via consistently achieving Class platform sales targets.</li><li>• To increase Class market coverage via new business activity in the region.</li><li>• To build the knowledge of accountants on Class' cloud offerings via face to face meetings and one to many events.</li><li>• Build a repository of suitable reference sites and promoters.</li><li>• Growth of revenue from existing clients in the region.</li><li>• Proactive account management of existing Class clients in the region.</li><li>• High levels of phone-based client facing activity.</li><li>• Representing the Class brand through delivery of webinars and product demonstrations.</li></ul> |
| <b>Knowledge, Experience and Expertise:</b> | <p><u>Knowledge:</u> Demonstrated experience in solution selling is mandatory. Understanding the SMSF industry, accounting practices and their relationships with auditors, planners and advisors would be desirable. Understanding of Cloud technology and FinTech is also desirable.</p> <p><u>Experience:</u> Proven phone-based business development and account management experience with accounting firms would be highly regarded.</p>   |

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|  | <p>The candidate could come from an SMSF administration background or technical sales or accounting background.</p> <p><u>Expertise:</u> Understanding SMSF accounting practices and the software platforms used would be desirable. Understanding of the SMSF and non-SMSF investment industry would be desirable. Proven phone-based demonstration and sales skills are essential.</p>   |
| <b>Professional / Tertiary Qualifications:</b> | <ul style="list-style-type: none"> <li>• A tertiary qualification in the fields of Business, Commerce or Accounting is preferable.</li> </ul>  |
| <b>Key Work / Behavioural Competencies:</b>    | <ul style="list-style-type: none"> <li>• Proven solution selling skills with strong track record of consistent sales and budget achievement.</li> <li>• Well-developed new business development and account management skills.</li> <li>• Highly developed phone-based presentation skills – webinar, one to one and one to many.</li> <li>• High levels of activity.</li> <li>• Strong high level influencing skills.</li> <li>• Strong verbal communication skills.</li> </ul> |
| <b>Compliance</b>                              | <ul style="list-style-type: none"> <li>• Contributing to health and safety at work by identifying, reporting and controlling hazards and promptly reporting any accident/incident</li> </ul>   |

- This Position Description is intended to provide a general framework and a delivery mechanism for the business. The Position Description may change as our business needs evolve.
- Other duties and desired outcomes may and can arise from the workflow generated.
- In line with our expectations, all team members, where skills and knowledge allow, are expected to take on work as allocated in direct consultation with their manager or business heads.