

## Business Development Representative

### Description

The primary function of the Business Development Representative (BDR) is to develop sales leads, establish both telephone and on-site appointments, work opportunities through the pipeline, and provide sales support to Senior Operations and Sales Leadership at Invoke. The qualified candidate must be able to make decisions independently to respond in a timely manner to the demands of the job. The BDR will provide timely responses to Prospects, Marketing, Management, Operations, and the Sales Team.

### Responsibilities

The primary objective of the BDR is to set initial client visits (ICV) for pre-identified Senior Leadership on a campaign basis in conjunction with the National Director of Sales and Marketing and Operational Leadership. The BDR will also take a large role in owning the lifecycle of an **individual sale** from lead generation to contract execution. This is typically achieved by:

- Identifying, researching, and pursuing prospects to generate new business for Invoke
- Developing leads and maintaining contact with prospects using various forms of communication
- Maintaining entries into Invoke's CRM tool QuickBase with all required information, including, lead, contact, estimated value and estimated close date
- Coordinating with marketing to generate necessary documentation to assist in deal closing (i.e. RFP's, presentations, contracts, etc.)
- Understanding service-line offerings with sufficient depth to be able to discuss with prospects
- Utilizing software tools to research contact information and new business opportunities
- Develop and call on new prospects in an effort to meet and exceed individual and department revenue expectations and meeting quotas
- Qualify and distribute sales leads from phone/internet, to the proper team member
- Assisting with other projects as needed and performing other duties as assigned

### Qualifications

Bachelor's degree or equivalent preferred. Ideally more than three years of sales and/or relevant industry experience.

- Ability to build phone rapport with identified prospects
- Must be a self-starter able to multi-task and adapt to changing situations
- Excellent written, verbal and presentation skills
- Proven work-ethic and time-management skills
- Intermediate or advanced skills with MS Office and QuickBase or other CRM

### Hiring organization

Invoke Tax Partners

### Employment Type

Full-time

### Job Location

Dallas, TX

### Date posted

January 15, 2024

