



## Job Description: USA

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**POSITION TITLE:** Sales Operations Administrator

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**REPORTS TO:** Inside Sales Manager/Director

**DATE:** October 25, 2017

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### SCOPE OF THE ROLE

The Sales Operations Administrator will play an integral role in building efficiencies across the US Sales organization. The role will have a day-to-day focus on data management and will take ownership of the Sales Order process. This is also a project oriented role that will include various projects designed to improve operations within, and sometimes outside of, the US Sales Team.

### RESPONSIBILITIES

The Sales Operations Administrator will support the sales, marketing and operations teams in ensuring the data integrity of EROAD's CRM (Salesforce) to increase the accuracy of sales reporting and analytics. This role will have a continuous goal of sales process improvement, across Direct and Indirect Channels, and will ensure that any areas of risk or inefficiency are quickly highlighted to management. Responsibilities will include:

#### Order Processing

- Manage the process of obtaining customer signatures on Sales and Service Agreements by ensuring accurate quote information (Sales input) and sending/tracking documents via DocuSign
- Engage with the sales associate during the signing process and answer any questions regarding the Contract and Terms & Conditions
- Maintain an advanced knowledge of the DocuSign program and processes for effective quote to cash processing
- Ensure quality of all completed orders by proactively resolving any issues or discrepancies
- Proactive engagement with internal teams, including sales, finance, support and fulfillment to ensure the smooth and timely execution of completed sales orders.

#### Sales Operations and Process Management

- Own creation, implementation and review of Sales Processes in EROAD's Process Management System (ProMapp)
- Assist in the creation and review of Sales Email Templates in Salesforce
- Collaborate with other departments and teams to proactively review and identify opportunities for sales process improvements, remove sales process bottlenecks and improve overall efficiency



- Assist operations, sales and marketing management in support of EROAD's overall goals and growth initiatives
- Ensure Sales accountability for Lead follow-up and quickly identify gaps and work-flow resolutions in Salesforce
- Calculate and Organize Sales compensation plans on a monthly and quarterly basis for Sales Management and Finance approval

#### **CRM Management & Reporting**

- Develop, lead and execute Salesforce data cleansing projects
- Create and maintain documentation and training materials relating to the Salesforce
- Perform daily administration and support of the Salesforce platform from a process perspective (not a technical one)
- Help sales and implementation teams optimize usage of Salesforce
- Gatekeeper of data quality/integrity by monitoring information contained in Salesforce and ensuring accuracy and completeness
- Enforce Salesforce best practices across the organization
- Maintain Salesforce Dashboards and Reports
- Provide analytics and reporting to the management team as requested
- Assist the Channel Account Managers in the collection of data contributing to the Quarterly Business Reviews of Channel Partners
- Maintain Salesforce Library and ensure that materials are up to date and reviewed consistently
- Process Partner Channel Agreements and ensure Partner Organization Records are set up correctly

#### **COMPETENCIES**

- Ability to use analytical skills to help identify opportunities and threats
- Strong understand and experience navigating Salesforce.com CRM
- DocuSign experience required, Pardot experience a plus
- Experience in Sales Support or Sales Operations

#### **PERSONAL ATTRIBUTES**

- Ability to multi-task and manage a wide range of responsibilities
- Comfortable working in a team-oriented environment
- Strong problem solving ability with "Get it done" attitude
- Strong communication – confident addressing customer inquiries/concerns while maintaining a high level of customer service
- Ability to thrive in a fast-paced, high-growth, dynamic atmosphere

This Job Description is not intended to be complete or limiting – the role will require a proactive and flexible approach to manage tasks that support a rapid and innovative product development environment.



EROAD is in a "high growth" mode. There will be times when the role will be required to complete tasks outside those mentioned above because this role will have the relevant skills and may have higher availability than other team members.