



Job Description – SALES SPECIALIST

An Advisory and Sales Services Specialist (“Specialist”), independently and as part of a team, is responsible for the following under the guidance of the CEO/Principal Broker:

- 1) Sourcing new business opportunities and exclusive listings as a leads team member for Brokerage Services and Advisory Services;
- 2) Sourcing and expanding upon new and current business contacts and accounts;
- 3) Evaluating and packaging projects;
- 4) Marketing projects; and
- 5) Closing the transaction.

In every undertaking, the Specialist must not only work within the bounds of acceptable legal practice, but with the integrity and reputation of Fraser Forbes Real Estate Services always in mind.

REPORTS TO: CEO/PRINCIPAL BROKER

WORKS WITH: CEO/President, Director of Operations and Director of Project Management

SPECIALIST RESPONSIBILITIES:

- Go thorough Fraser Forbes on-boarding/training program through our Fraser Forbes University, typically lasting 90 days;
- Abide by, and adhere to, the terms set forth within his/her respective Independent Contractor Agreement and the Corporate Manual;
- Source and service new and existing business opportunities, contacts and accounts to drive individual and firm sales and consulting revenue using resources that include, but are not limited to:
 - Fraser Forbes Resource Binder;
 - Personal and professional contacts;
 - Company and industry market research tools;
 - Professional networking and events;
 - Phone, email and social media connectivity; and
 - Business development meetings;
- Analyze, evaluate and prepare opportunities for marketing by company engagement and completing opportunity qualifications that include at a minimum the following:
 - Opportunity Evaluation Metrics System (OEMS);
 - Internal valuation (Fraser Forbes valuation model);
 - Presentations which include, Broker Opinion of Value (BOV’s); and
 - Offering Memorandums (OM’s);
- Marketing of projects with prospective buyers following a marketing strategy and timeline with specific due dates;
- Closing the transaction with attention to critical path items;
- Successfully deliver on the sales metrics that are set forth at the beginning of each year. Specific metrics are customized for each sales specialist and include the following:
 - Sourcing of new companies and contacts for sales and consulting opportunities;
 - Sourcing and attending new business development opportunities and meetings;



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- New lead generation;
- Securing of exclusive listings and other opportunities; and
- Achieving sales and commission revenue results as outlined in associate's annual business plan;
- Accurately and timely record all pertinent contacts, leads, accounts, opportunities, actions, notes, and updates in Salesforce pursuant to the firm's policies and procedures;
- Represent Fraser Forbes in a professional and positive manner at all times, and in all forms of communication; and
- Attend and participate in regular Fraser Forbes internal meetings as set by the annual Internal Meeting Schedule found in the Resource Binder.