
Job Description – Deal Desk

BASIC FUNCTION:

The function of the Deal Desk is to provide direct support to the Sales Team, Business Unit Managers and business development representatives in the analysis, development, costing and approval of quotes for existing and prospective TERiX partners and customers to ensure that the Sales department is able to meet its growth and profitability targets.

PRINCIPAL DUTIES:

The following are principal duties of the Deal Desk:

Leadership and Management

- Represent TERiX in a positive and professional manner
- Work with all personnel and outside contacts to satisfy clients and achieve company goals
- Identify areas of improvement in the company and assist in creating and implementing solutions
- Analyze, evaluate, develop and deploy quote and financial offers for business unit managers and inside sales and sales representatives that meet the approved product support, cost, margin and quotation guidelines and principles set by the Director of Sales and TERiX Managing Partners.
- Research, solicit, present, negotiate and secure Command Partner support costs and proper parts logistics support in support costs of financial quotes and commitments to sales managers and reps on deals.
- Proper work ethic, and attention to detail, arrive to work and meetings on time and prepared
- Perform any other duties and reporting assigned by the Director of Sales

Deal Desk

- Use guidelines and strategies of management to maintain proper product support mix, proper backline support costs, proper margins, profits and terms in all TERiX proposals, quotes and transactions prior to their submission to customers, partners or prospects
- Complete and maintain accurate records of approved deals and communications with subK
- Conduct quality checks to ensure enforcement of approvals and proposal terms
- Develop all quotations and approvals in cooperation with the Inside Sales and Managers based on identified sales strategy and information collected from customers and partners
- Participate in management meetings and take responsibility for sales deal desk and Command Partner improvement initiatives and other assigned action items
- Work with Contracts Coordinator to align deal desk quotes, booking of orders, and reporting to be above reproach and error free with regard to both adds and deletes of customer/partner contracts
- Collaborate with the Managing Partners and the Director of Sales to learn and understand proper business judgments to lead to self-sufficiency in deal desk processing including margin retention
- Perform reporting functions on an ongoing and timely basis including Summary of type, area, value and product type of approved Quotes, Bookings and Renewals deal desk processed
- Assist in completing sales projects including proposals and marketing as needed in addition to financial deal desk processing and Command Partner support processing for deal requirements
- Work in cooperation with Contracts Coordinator and department personnel in fulfillment as needed.

RESPONSIBILITIES:

The Deal Desk is responsible for ensuring that:

- All of the duties of the position are completed as per the job description
- Sales deal desk and associated Command Partner administrative duties are performed accurate and timely
- Collecting and reporting as requested by the Director of Sales
- Assisting Sales Managers on an as needed basis in deal desk and pricing strategies

AUTHORITIES:

The following are principal authorities granted to the Deal Desk:

- Exercise the responsibilities and perform the duties of this position. This includes full decision-making authority for all responsibilities and duties assigned
- Provide recommendations regarding the improvement of deal desk and Command Partner procedures
- Request assistance from the Service Support Manager in acquiring customer data
- Provide assistance to teammates in discussions with customers in the development of quotations
- Provide assistance to the Contract Coordinator with negotiations with Command Partner service providers to extend contracts to cover service delivery requirements within existing pricing structures

REPORTING RELATIONSHIP:

- Deal Desk reports to the Director of Sales.
- Direct Reports of the Deal Desk: None at this time.

QUALIFICATIONS:

- One Year or more Sales Experience and knowledge and quick study to TERiX business processes
- BSBA in Marketing or Business Administration, Financial and Services Industry experience.
- Working Knowledge of Microsoft Word, Excel, PowerPoint with significant skills in advanced use of EXCEL (analysis, costing, reporting, tables, macros, etc).
- Working Hours 8:30am – 5:30 pm, 8am-5pm or other as designated by the Director.

MEASURES OF PERFORMANCE:

The following will be used to evaluate and compensate the performance of the Deal Desk position

- MBO as assigned by your manager in support of evaluation of business decisions and accuracy against stated guidelines for your Deal Desk role.
- General evaluation of work ethic, attendance and support as provided by the Director of Sales.
- Evaluation of special assignments or special reporting as is requested from time to time.

Compensation/Plan: The Deal Desk role will have a plan that includes the following: Base Salary, MBO or Bonus, Benefits, 15 days PTO/Vacation/Sick days, company holidays, 401K available, company laptop and PDA. Location: Dublin, OH

THIS JOB DESCRIPTION HAS BEEN AGREED UPON BY:

Deal Desk: _____ Date: _____