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# Example of Internal Sales Job Description

Our company is growing rapidly and is looking to fill the role of internal sales. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for internal sales

* Answering advisor inquiries via inbound sales calls
* Developing and maintaining advisor profile and data within our CRM
* Acting as the main support person for business development with respect to interaction with either independent financial advisors or financial advisors at wirehouses
* Scheduling meetings with financial advisors and RIAs and following up on action points post meetings to ensure sales opportunities are maximized
* Fielding inquiries and providing relevant information and materials in a timely fashion
* Proactively reaching out to potential new clients and transmission of business leads to external sales team with a view to increasing sales
* Conducting market research and understanding standard practices for servicing financial advisors and RIAs
* Preparing timely and accurate detailed progress reports and analysis for management information
* Safeguarding and maintaining customers and company data protection at all times
* Develop and implement best practices, standards and procedures monitor adherence including compliance with local, state and federal requirements

## Qualifications for internal sales

* Exceptional Sales, Client Service and Presentations skills
* BA/BS/MBA in Finance, Business or related field strong preferred
* Sales experience (internal) strongly preferred
* Understanding of financial/investment industry required
* NASD Series 7 and 66 preferred, or ability to obtain
* Develop strong working relationship with various departments including Contracts and Legal, Compliance, Operations, Marketing, Product Strategy and Development, Investment Centers, plus other sales teams including PowerShares, UIT team