



Example of Relationship Sales Job Description

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Our growing company is hiring for a relationship sales. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for relationship sales

- Able to work independently and be aggressive and creative in acquiring new business
- Achieve an assigned customer retention and growth rates within the assigned territory in an up selling environment
- Skill in active listening, asking strategic questions, analyzing customer data, and the ability to interpret and address customer needs
- Negotiate increased service rates to positively impact product margins
- Provide solutions that address specific customer needs to assure growth in renewal accounts
- Explore the opportunity to become the sole source service provider by aligning customer growth plans and delivering a level of service excellence
- Report, record and communicate market developments/trends that will assist the sales and renewal strategies manage the pipeline
- Complete month-end reporting and participate in meetings
- Assist with special projects and the mentoring of new team members
- Contributes to the development of sales support materials

Qualifications for relationship sales

- Minimum 3 years institutional sales or intermediary sales experience in a Hong Kong based asset management firm
- Knowledge of key stakeholders/gatekeepers in private banks and ability to sell to sophisticated clients
- Demonstrated ability to obtain FINRA Series 7 and 66 licenses, Life and

- Competitor product knowledge
- Minimum one year experience in sales and/or Retail Banking