

**LEAD GENERATION SPECIALIST – Financial Services
CONVERGENCE INC.
NORTH AMERICA – Inside Sales
January 2021**

Convergence Inc. is a market leader that has created an entirely new platform comprising data, analytical products, and services that penetrate and assess the operations of Alternative Asset Managers and Reference Data on all 18,000 SEC Registered Advisors and 20,000 State Registered Advisors. Our product set is unique, as it is independently sourced and verifiable to data produced by the Advisor and contains original content derived in the form of practices and benchmarking. Our Portal is updated and refreshed daily. We have created a database providing transparency into 40,000 Registered Investment Advisors and the eco-system that supports the RIA. Product Information can be found at www.convergenceinc.com

SUMMARY OF THE POSITION

Part-Time Position – 20-25 hours per week –

Generate leads for the Sales Team from the following Markets:

- Fund Administrators
- Audit
- Custodians
- Prime Brokers
- Law Firms
- FinTech Firms
- Advisors
- Allocators

MEETING TARGETS

- Daily – 50 to 100 outbound calls – emails – Linked In connections – Lists to be provided
- Monthly - 25 to 50 Telephone or Virtual Meetings set up for the Sales Team

TERRITORY

National

MAIN RESPONSIBILITIES AND DUTIES

- **Lead the Lead Generation Efforts at Convergence**
- Develop new contacts for our sales team via LinkedIn
- Leverage best in class email tools
- Develop sales opportunities via cold call and/or email
- Listen to the clients' needs and set up meetings for the sales team
- Clearly communicate client product descriptions and accurately record qualifying questions
- Manage incoming calls from new and existing clients as well as making outgoing "cold" to "hot" calls to develop new business

SKILLS AND QUALIFICATIONS

- Experience in this role at a Service Provider focused on the Asset Management Industry
- Proven track record of Lead Generation capabilities and execution exceeding goal
- Relevant experience in the financial services industry, ideally within the asset management space and eco-system
- **Personal Attributes**

- Leadership qualities
- High degree of persistence
- Excellent communication and interpersonal skills
- Innovative and entrepreneurial
- Ability to work with multi-disciplinary senior management
- Service-oriented, dynamic people-person with ability to build the business
- High degree of diplomacy, tolerance, natural confidence and enthusiasm
- Process-oriented work ethic and attention to detail
- Ability to remain highly motivated and focused on the key measurements of the job

- **Business skills and experience**

- Sound knowledge of financial services is essential
- Ability to manage and work with teams involved in multiple disciplines across different locations
- Must have a proven record of Lead Generation, cold calling B2B (references upon request)
- Friendly, upbeat personality with excellent communication and phone skills
- Professional demeanor
- Knowledge of sales techniques for opening sales conversations & new opportunity
- Persistent and results-oriented
- Patient and able to handle objections
- Proven experience as a telemarketer or similar sales/customer service role
- Proficient in English
- Eastern time zone preferred