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## Sales Operations Specialist (Spanish and English Speaking)

### Description

The Bilingual Sales Operations Specialist (Spanish speaking and English speaking) provides operational and administrative support to Sales and Marketing team members. This person will serve as the go-to resource for new merchant onboarding as well as provide support and training of Spanish speaking merchants (**B2B**). The Sales Operations Specialist is part of the sales team responsible for merchants setup, training and CRM reporting to support sales processes, merchant promotions and other sales initiatives.

### Responsibilities

#### SALES OPERATIONS

- Execute and manage a variety of functions in UCFS' heavily used systems:
  - **HubSpot**
    - Perform monthly CRM data maintenance, data updating and data cleanup projects
    - Handle all back-end HubSpot administrator responsibilities
    - Generate and manage CRM lists that drive email communications and various projects cross-departmentally
    - Run weekly and monthly reports to send to sales management and salespeople
  - PandaDoc
    - Update and organize our eSignature platform when changes are made to our Merchant Agreement and/or Exhibit Pages
  - The company's proprietary business system – AS400 – for UCFS' In-Home Sales Channel
- Handle all details of an efficient client onboarding process from start to finish which includes:
  - Gather needed documents to verify prospective merchant business legitimacy and soundness
  - Collect and track approvals of documentation to become a new business customer

#### MARKETING

- Update and maintain the company lobby visual scrolling video
- Develop merchant and consumer brochures to be distributed upon request
- Proofread emails and other materials, as needed
- Provide administrative support to sales and marketing as needed, such as holiday cards, customer gifts.

### Abilities and Skills

- A self-starter on independent projects and tasks and also works well as a contributing member on group projects.
- Passionate about using data as a tool for business growth
- Excellent organization skills and ability to keep processes moving forward.

### Hiring organization

United Consumer Financial Services

### Employment Type

Full-time

### Duration of employment

Permanent Position

### Industry

Financial Services

### Job Location

Westlake, Ohio

### Date posted

June 18, 2024

### Valid through

30.09.2024

- Ability to see contribution of department from an organizational perspective.
- Communicates effectively (verbally and in writing) to a wide range of internal and external customers/clients/management.
- Communicates effectively (verbally and in writing) in both English and Spanish.
- Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.
- Ability to multi-task in a busy, fast-paced, sometimes stressful environment with frequent interruptions.
- Ability to recognize opportunities and take action to enhance the process flow to increase efficiency.
- Strong attention to detail with thorough proofreading
- Strong ability to see projects through to completion
- Proficiency with a computer, standard office equipment, smart phone, and computer programs
- Strong skills with Adobe Acrobat (PDF) and Microsoft Office Suite (Outlook, Excel, Word, PowerPoint).
- Internet/search engine savvy.

### **Qualifications**

- BA/BS degree required
- 3+ years' experience in an office environment
- B2B support services experience is preferred
- HubSpot experience needed. HubSpot Academy certifications are a plus!
- Must be fluent in oral and written communications of English and Spanish.

### **Other Information**

- This position operates in a professional office environment at UCFS offices in Westlake, Ohio.
- This is a full-time position, which is defined as being scheduled to work up to 40 hours or more per week, Monday through Friday.

*\*UCFS is closed on New Year's Day, Easter, Thanksgiving and Christmas Day.*