



**Job Title:**

Client Advisor

**Reports To:**

The Client Advisor will report to the Owners

**Classification:**

Full-time, Exempt

**Job Overview:**

The Client Advisor is responsible for selling HTB's products and services to new clients. The Advisor will establish new relationships with targeted clients, determine who the decision-maker(s) is, qualify the business, and document conversations and relevant information in a client relationship management (CRM) system. In addition, the Advisor will become completely familiar with the products and services offered by HTB, including their features and benefits. The Advisor will work with prospective clients to help them understand the value of HTB's offerings. Ultimately, the Client Advisor is expected to close sales, bringing in new, profitable business.

It's important that the Client Advisor form a partnership relationship with new clients. HTB is interested in long-term, mutually beneficial relationships. This requires the Advisor to have a clear understanding of the client's needs, sensitivities, desired outcomes, and pain points, which enables the Advisor to suggest possible solutions using HTB offerings.

This position requires daily travel within the Baltimore-Washington, D.C. metro area. Occasional out of town travel may be required, rarely overnight. While this is an outside sales position, the Client Advisor is also expected to use networking, social media, and other marketing tools to develop client relationships.

**Responsibilities, Duties, & Skills Required**

- Complete familiarity with HTB product and service offerings.
- Cold calling - in person, on the phone, and via e-mail on a daily basis.
- Development of marketing materials, including suggested changes to HTB's current materials, website, and social media platforms.
- Comprehensive understanding of the features and benefits of HTB's offerings, and the ability to communicate the same to prospective clients.
- Development and management of a CRM platform, which is kept completely up to date, daily.
- The ability to overcome objections and close new business.
- A client service, solutions-oriented mentality.
- A superior level of follow-up.
- High standards and attention to detail.
- Superior communications skills, both oral and written.

**Qualifications:**

- Bachelor's degree preferred.
- Emergency Medical Technician (EMT) or Paramedic qualifications preferred.
- 1-3 years' sales and business development experience required.
- Prior experience with CRM systems required.

- Experience with social media platforms and marketing on those platforms required.
- Must currently possess or obtain American Heart Association (AHA), American Safety and Health Institute (ASHI) Emergency Medical Response, and Stop the Bleed Instructor level certifications within the first 60 days of employment.
- Must be enthusiastic, responsible, articulate and well organized.
- Valid Driver's License and clean driving record.
- Successful completion of Pre-Employment Screening background check.

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk and hear. This position is very active and requires standing, walking, bending, kneeling, stooping and crouching. The position may require occasional lifting of products weighing up to 30 pounds.

**Position Type and Expected Hours of Work**

This is a full-time position and regularly requires long hours, and may require periodic evening and weekend work.

**Travel**

Must have flexibility in various work environments and be willing to travel locally.

**Work Authorization/Security Clearance**

All employees must complete I-9 authorization within first three days of employment.

**AAP/EEO Statement**

Heart To Beat is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, sex, religion, sexual orientation, veteran status, national origin, age, disability, or any other protected classification.

**Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

**Signatures**

This job description has been approved by all levels of management:

**MANAGER**\_\_\_\_\_

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

**EMPLOYEE**\_\_\_\_\_ **DATE**\_\_\_\_\_