JOB DESCRIPTION

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| **TITLE:** | Solutions Strategist 1,2,3 | **DATE:** | 5/2018 |
| **REPORTS TO:** | Sales Operations Manager | **FLSA STATUS:** | Hourly Non-Exempt |
| **DEPARTMENT:** | Sales | **MGT/SPVR:** | No |

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**SUMMARY**

The Solutions Strategist supports the sales office(s) for all bid responses, budget deliverables and sales directed administrative duties. Responsible for clarity, quality, accuracy, and completeness of the bid response and budget deliverables, as well as teaming with Sales, Sales Management and Sales Operations to create effective, winning bid strategies. Single point of contact connecting Sales, Sales Management and Sales Operations during the bid response. Ensures that all deliverables meet the bid and budget timelines.

**ESSENTIAL DUTIES AND RESPONSIBILITIES***include the following. Other duties may be assigned.*

* Reviews RFP upon receipt and leads initial meeting with Sales, Sales Management and Sales Operations to determine the move-forward strategy.
* Identifies any contractual language in the bid that needs to be reviewed by Pivot Leadership and/or Accounting .
* Organizes and leads all bid meetings and is responsible for assigning and coordinating all deliverables.
* Creates bid timeline with task due dates.
* Identifies any additional bid requirements ( i.e. product and warranty information, fabrics/finishes, process questions, related project experience, etc) and coordinates deliverables with the appropriate parties.
* Follows up with task assignees to ensure they are on track to deliver the required content by stated deadlines
  + Systems pricing and image deliverables and estimate of hours from Design Group
  + Ancillary pricing and image deliverables from self or Ancillary Design Group
  + Labor pricing from PM/Installation Group
  + Project schedule from the PM Group
  + Additional Visuals (i.e. renderings, fly-throughs, org. charts)
  + Branding of document from Marketing
* Owns final pricing template compiling all departmental pricing (products & services) with accuracy and delivered on-time.
* Works with Sales Management to ensure the clarity and accuracy of final bid document.
* Provides final complete document to sales for delivery.
* Tracks time worked into database by job/project every week.
* Performs specification double checks for other Designers when possible.
* Incorporates best practices for product applications and bid responses. Continuously seeks out learning opportunities for product applications and shares with design departments.
* Assists with double checking specifications as required.
* Provides knowledge base leveraging past RFP responses for an efficient response turn around. Manage Win/Loss Analysis program.
* Helps manage CRM database to help clean data & uncover new opportunities.
* Provides in-house ancillary support duties as directed by sales.
* Utilizes budget templates, contacts vendors, creates spreadsheets, organizes solutions and alternates in a compelling document.
* Tracks and manages hours against bid response in support of project compensation.
* Performs other duties or special projects as assigned.

**SUPERVISORY RESPONSIBILITIES**

This position has no supervisory responsibilities.

**EDUCATION and/or EXPERIENCE**

**Solutions Strategist 1** - Requires a high school diploma or GED plus Bachelor’s degree and up to 2 years of related experience;or equivalent combination of education and experience. Has knowledge of commonly-used concepts, practices, and procedures within field. Relies on instructions and pre-established guidelines to perform the functions of the job. Works under immediate supervision. Primary job functions do not typically require exercising independent judgment. Operations database experience is preferred, as well as previous working experience with Illustrator, Photoshop, CAP 20/20, InDesign and Microsoft Office Suite.

**Solutions Strategist 2** - Requires a high school diploma or GED plus Bachelor’s degree and up 2-5 years of related experience;or equivalent combination of education and experience. Familiarity with standard concepts, practices, and procedures within field. Relies on limited experience and judgment to plan and accomplish goals. Operations database experience is preferred, as well as previous working experience with Illustrator, Photoshop, CAP 20/20, InDesign and Microsoft Office Suite.

**Solutions Strategist 3** - Requires a high school diploma or GED plus Bachelor’s degree and at least 5 years of related experience;or equivalent combination of education and experience. Familiar with a variety of the field's concepts, practices, and procedures. Relies on experience and judgment to plan and accomplish goals. Performs a variety of tasks. May lead, train and direct the work of others. A wide degree of creativity and latitude is expected. Operations database experience is preferred, as well as previous working experience with Illustrator, Photoshop, CAP 20/20, InDesign and Microsoft Office Suite.

**QUALIFICATIONS** *To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions*.

**LANGUAGE SKILLS**

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals written in English. Ability to write routine reports and correspondence in English. Ability to identify and pursue missing or incomplete data. Ability to speak effectively, in English, before small groups of customers or employees of organization.

**MATHEMATICAL SKILLS**

Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent. High level of accuracy and attention to detail. Extensive background in use of word processing and database programs.

**REASONING ABILITY**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

**CERTIFICATES, LICENSES, REGISTRATIONS**

None required.

**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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

While performing the duties of this job, the employee is regularly required to use hands and fingers to operate a computer keyboard, mouse, and telephone keypad; and talk or hear. The employee frequently is required to stand, walk, sit, and reach with hands and arms. The employee is occasionally required to stoop, kneel, or crouch. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, color vision, and ability to adjust focus.

**WORK ENVIRONMENT** *The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

The noise level in the work environment is usually moderate.

Equal Opportunity Employer–minorities/females/veterans/individuals with disabilities/sexual orientation/gender identity.