

# Moving healthcare forward. Together.

## We are hiring!

### Sales Force Effectiveness Analyst 1- Q<sup>2</sup> Solutions

### #1804233

#### **PURPOSE**

The Salesforce Analyst works within the Sales Operations Organization to process and ensure that all sales and/or quantitative data is captured in the appropriate database (CRM). Daily Salesforce usage is required to process Awards, change orders, cancellations and work orders. These items are provided by internal teams (Sales, Finance, Contracts, etc.) to process on a daily basis. This role requires daily internal support, attention to detail, and monthly deadlines. Proficiency using Salesforce, Lotus Notes and Excel. Must be comfortable using excel spreadsheets, creating pivot tables, writing formulas, and calculating fields within Excel.

#### **RESPONSIBILITIES**

- Processing newly awarded studies throughout the sales cycle in CRM (Salesforce). From the proposal sent stage to pre-award and awarded stages. Updating the product fields within the study as required and verifying to ensure the awarded amount is identical to the amount within the budget. Generating project codes for newly awarded studies via an excel spreadsheet.
- Must be familiar with Lotus Notes where project codes and awarded study information is entered.
- Processing work orders in CRM and moving these studies to the signed contract stage which includes a two-step process.
- Creating change order opportunity records using the salesforce database while also utilizing an excel spreadsheet to calculate variance amounts into required product fields within Salesforce. This can be a time-consuming process and requires great attention to detail.
- Processing cancelled studies by creating a cancellation record in Salesforce and populating the required fields. An excel spreadsheet is provided with the cancellations so a comfortable level of excel experience is required.
- Conduct verbal and/or written follow-up with internal colleagues regarding the information provided by this department.

- Perform quality Control edits on all documents/reports before issue to internal customers.
- Will be responsible for developing custom reports, dashboards, and processes to continuously monitor data quality and integrity.
- Analyst will work with internal customers to gather requirements and propose ongoing enhancements and capabilities.
- Analyst will also assist with predictive performance analytics.

## **REQUIRED KNOWLEDGE, SKILLS AND ABILITIES**

Degree in Life Science, Business Management or related field and direct experience in Proposals; or equivalent combination of education, training and experience

## **PHYSICAL REQUIREMENTS**

- Extensive use of telephone and face-to-face communication requiring accurate perception of speech
- Extensive use of keyboard requiring repetitive motion of fingers