



## Position Description

**Title:** Sales Account Executive  
**FLSA Status:** Exempt  
**Location:** Remote/Hybrid  
**Salary Range:** Based on Experience

### PRIMARY PURPOSE OF THE POSITION:

To advance IMS's mission by generating revenue through effective sales to new and former clients.

**KEY RESPONSIBILITIES:** The following statements describe the key responsibilities to be performed by the position. Key responsibilities are those the individual must be able to perform unaided or with the assistance of a reasonable accommodation.

- Generate new business opportunities through outreach, networking, and strategic follow-up on warm leads
- Attend relevant conferences and events to network with potential clients and promote IMS's document management solutions; Conduct occasional overnight travel as required
- Engage in community outreach and other creative approaches to build relationships and develop a pipeline of new clients
- Build and maintain a deep understanding of the document management needs of our clients and articulate the value of transitioning to digital records
- Create new contracts and update progress on all sales activities within the CRM system to maintain an accurate and up-to-date sales pipeline
- Collaborate with the IMS sales team and President to set and achieve sales targets.
- Other duties as assigned

IMS's philosophy is to maintain a flexible, cooperative, and collaborative work environment; in that regard, this position will be expected to perform duties outside the key responsibilities.

**MINIMUM REQUIREMENTS:** Following is the requisite education and/or work experience for this position.

- Proven experience in sales, preferable in technology or document management solutions
- Excellent verbal and written communication skills
- Strong organizational skills and the ability to manage multiple accounts and projects
- Experience using CRM software to track sales activities and manage client relationships
- A proactive attitude and self-motivation to succeed in a remote work environment
- Ability to travel occasionally to conferences or client meetings

**PREFERRED SKILLS:** The following are the skills needed to be successful in this position. Examples; leadership, communication, innovation, conflict management, problem solving, self-starter, etc.

- Experience in document management, digital transformation, or similar industries with at least two years of previous sales experience
- Familiarity with CRM software and sales tracking tools
- Understanding of document scanning and the transition from paper-based to digital recordkeeping systems
- Understanding of digital accessibility

**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.

- This position operates in a professional office environment and routinely requires use of standard office equipment such as computers, phones, copiers
- While performing the duties of this job, physical demands with activity or condition requiring a considerable amount of time include talking and hearing, sitting, and typing/keyboarding using a computer (i.e., keyboard, mouse, and monitor)
- Physical demands may include standing, walking, use of hands to manipulate, handle or feel, carrying, reaching, standing, and stooping
- May require occasional lifting/lowering, pushing, or pulling up to 20 lbs.