**July 2020**

Partner Onboarding Specialist (Secondment)

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# Our Purpose

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At Xero, we’re here to make running a business beautiful. By making small business more efficient every day, connecting them with big business technology and empowering a community behind them, their potential is limitless. When that happens, we’re not only helping small business, we’ll be building a stronger economy that can change the world.

# How you’ll make an impact

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This role is responsible for supporting the Senior Account Managers (SAMs) and Account Managers (AMs) by growing and developing and managing Xero relationships with Accounting and Bookkeeping channels.

POS Mission: The POS team are empowering partners to understand the potential of our platform and program to significantly change their lives and give them time to focus on the things that matter

You will be helping with the beginning of the Partners journey. You will build warm relationships but to also increase adoption of product usage. In particular you will need to showcase both Xero HQ, Xero Tax and the partner benefits. You will be crucial in delivering a great partner experience and ensuing you are keeping a record of their progress in our CRM.

# What you’ll do

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* Respond to all inbound inquiries (Phone, Email and Marketing).
* Qualifying partner leads that come in to Xero.
* Provide phone-based engagement with clients to handle day-to-day issues, responding in a timely manner. Similar for requests submitted via email (cases).
* Identify opportunities within your dashboard to act accordingly.
* Being the point of contact for Marketing campaign's.
* Updating CRM system with all practice communications including calls and emails.
* Develop best practices processes to support repeatable activities.
* Monitoring all existing and prospective Partners progress through the sales cycle.
* Knowledge of Partner tools (HQ/XT/XPM) an advantage.
* Knowledge of Adjacent tools (Projects/Expenses/Hubdoc) an advantage.
* Ability to demo products is an advantage.
* Ability to build rapport quickly and maintain strong relationships for long term growth.

**Where you’ll fit in**

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| **Based in** | **Team** | **Manager** | **Direct reports** | **Contract type** |
| NZ or AU | Partner Onboarding | Partner Onboarding Team Lead | N/A | Full-time 6 month secondment |

# Success looks like

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Being the first point of contact to build a successful relationship with Xero. Successfully supporting Xero sales staff in ensuring a high level of data quality to enable the rapid and accurate identification of sales activity and the increase of customer satisfaction. Meeting monthly activity KPI’s and software adoption KPI's.

# What you’ll bring with you

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| **Critical competencies** | **Experience** |
| * Ability to quickly build rapport with people via telephone. * Attention to detail and follow-up. * Process driven and takes ownership. * Outstanding written and oral communication skills. * Self motivation, energy, passion and determination to succeed. * Proven ability to drive education and sales * Ability to build established relationships with Xero Partners | * Telesales experience. * Ability to undertake inbound and outbound calls to customers in a consistent and timely manner. * Knowledge of accounting practices and small to medium business needs. * CRM discipline. |

# What we value

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| **Human**  Xeros are authentic, inclusive and really care. | **Challenge**  Xeros dream big, lead  and embrace change. | **Team**  Xeros are great  team players. | **Ownership**  Xeros deliver on our commitments. | **Beautiful**  Xeros create experiences that people love. |

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*This position description is intended merely as a guideline of the responsibilities involved in the position. The employee is expected to perform any other duties as reasonably required by their Manager.*

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