



Job Title: Sales and Marketing Coordinator  
Reports To: Director of Business Development  
Date: June 2024

Summary: The Sales and Marketing Coordinator role assists with carrying out a variety of functions as needed by the members of the sales and marketing team.

**Key Result Area #1 – Successfully Transition New Clients from Sales to Ops**

- Coordinate scheduling of all new client setup meetings with the operations team
- Collect and/or verify all necessary new client paperwork has been received and is readily available to onboarding teams
- Ensure all necessary systems are setup thoroughly within 3 days of a new PATS client install

**Key Result Area #2 – Make All Members of the Sales and Marketing Team More Effective**

- Proactively reach out to all members of the sales and marketing team to find ways to remove administrative tasks from their daily schedules
- Assist in keeping the CRM up to date with detailed notes, tasks and activities
- Coordinate a variety of public relation tasks to increase brand awareness and image

**Key Result Area #3 – Make the Events we Host or Attend Awesome**

- Assist with the planning, scheduling, and execution of all firm hosted events
- Coordinate all logistics for events we are attending by proactively planning and executing on all necessary arrangements
- Be available during all events for any last minute or unforeseen needs

**Key Result Area #4 – Be the Primary Backup for the Client Care Coordinator role**

- Stay informed of all functions of the CCC role via regular cross training and be ready to step into the role at all times without much notice
- Attend all admin team trainings as scheduled throughout the year

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Team Member's Name

Date

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Team Leader's Name

Date