**Sales Operations Specialist**

**Overview**The Sales Operations Specialist supports the efficiency, effectiveness, and scalability of the sales organization. This role focuses on managing the company’s CRM platform(s) (e.g., [CRM System Name]), optimizing sales processes, ensuring data integrity, and enabling leadership with actionable reporting and insights. The ideal candidate has strong technical expertise in CRM and revenue tools, a deep understanding of sales workflows, and experience balancing tactical support with strategic process improvements.

**Key Responsibilities**

**CRM Administration & Optimization (50%)**

* Serve as the primary administrator for [CRM System Name], including user management, permissions, roles, and profiles.
* Customize fields, page layouts, record types, validation rules, workflows, and automations to align with evolving sales processes.
* Manage integrations between [CRM System Name] and connected systems (e.g., marketing automation, CPQ, ERP, iPaaS).
* Implement and refine lead routing, opportunity management, and pipeline processes to ensure data accuracy and sales team efficiency.
* Monitor system performance, troubleshoot issues, and recommend enhancements.

**Sales Process & Enablement (25%)**

* Partner with sales leadership to document, refine, and standardize sales processes.
* Support forecasting, quota tracking, and territory alignment activities.
* Provide training, documentation, and day-to-day support to sales team members on [CRM System Name] functionality and best practices.
* Identify bottlenecks or gaps in sales execution and propose process or tool-based solutions.

**Data Management & Reporting (25%)**

* Maintain clean, accurate, and up-to-date data across [CRM System Name] and related systems.
* Build and maintain dashboards, reports, and analytics to provide actionable insights to sales leadership and cross-functional teams.
* Perform routine data audits, deduplication, and enrichment processes to ensure high data quality.
* Analyze sales metrics (e.g., win rates, conversion rates, pipeline velocity) and deliver insights that inform decision-making.

**Cross-Functional Collaboration**

* Work closely with Marketing, Customer Success, Operations, Finance, and IT to ensure alignment of data, processes, and systems.
* Support RevOps initiatives by contributing to evaluations and implementations of new tools in the revenue tech stack.
* Serve as a subject-matter expert on [CRM System Name] within cross-functional projects.

**Qualifications**

**Required**

* Bachelor’s degree in Business, Marketing, Information Systems, or related field (or equivalent experience).
* 2–4 years of experience in a Sales Operations, Revenue Operations, or CRM administration role.
* Proficiency in [CRM System Name] administration (certifications preferred where applicable).
* Strong understanding of sales processes, pipeline management, and forecasting.

**Preferred**

* Experience with data management, reporting, and visualization tools (e.g., Excel, Power BI, Tableau).
* Familiarity with marketing automation platforms, CPQ tools, or iPaaS solutions a plus.
* Excellent problem-solving, analytical, and communication skills.

**Success in this Role Looks Like**

* The sales team consistently uses [CRM System Name] with accurate, up-to-date data and minimal errors.
* Dashboards and reports are timely, reliable, and provide actionable insights for sales leadership.
* Lead routing, opportunity governance, and territory management processes run efficiently, enabling reps to focus on selling.
* Cross-functional collaboration with Marketing, RevOps, and Finance ensures aligned processes, clean data, and smooth workflows.
* Systems, automations, and sales processes are regularly reviewed and optimized to support growth and scalability.