TITLE: Business Operations Specialist

DEPARTMENT: Operations

REPORTS TO: CFO, VP Client Solutions and VP Sales

FLSA STATUS: Exempt

POSITIONS SUPERVISED: N/A

MISSION: The Business Operations Support Specialist provides comprehensive administrative, organizational, and operational support across the organization. This position works collaboratively with executive leadership, sales, internal business operations and client-facing teams to ensure business processes, systems, documentation, reporting, meetings and internal initiatives are organized, accurate and executed efficiently. This is a process-focused role requiring strong organizational skills, technical aptitude, excellent writing skills, and high attention to detail.

KEY RESPONSIBILITIES:
The responsibilities outlined below represent the various functions and activities that may fall within this role. These duties are performed as needed, based on business priorities, project requirements, and organizational needs, and are not necessarily expected to be performed daily. The scope and frequency of responsibilities may vary depending on current initiatives, departmental needs, and direction from leadership.

General Business Operations Support

- Support cross-functional business projects, process documentation, templates, tracking tools, and internal initiatives.
- Identify opportunities to streamline workflows, improve organization, reduce duplication, and increase consistency across systems.

Client Administration & Reporting

- Maintain accurate client records, including accounts, contacts, opportunities, activities, and pipeline data.
- Create and update client reports, dashboards, sales tracking tools, and pipeline reports.
- Support process improvements, workflow updates, reporting definitions, and basic troubleshooting.

Salesforce Administration and Reporting

- Manage and maintain the company's Salesforce system, ensuring information is accurate, complete, organized and current.
- Maintain salesforce accounts, contacts, pipeline information and other relevant records.
- Create, maintain, and update CRM reports, dashboards, tracking tools and other reporting resources.

- Support presentation process by maintaining cross-team timelines and deliverables.
- Maintain and monitor ISR agreements to ensure agreements are current, complete, and properly documented.
- Track agreement dates, renewal requirements, updates and outstanding items.

Proposal & RFP Administration

- Coordinate and provide administrative support throughout the proposal and RFP process.
- Maintain a centralized tracking system for proposals, RFPs, deadlines, submissions, and follow-up activities.
- Collect, organize, format, and update PowerPoint decks, proposal language, and reusable sales content on as needed basis.
- Compile, organize, and present information and reports as requested by leadership and internal departments.
- Identify data discrepancies and coordinate with appropriate team members to ensure information is accurate and current.

PPR & SPN Process Coordination

- Manage the PPR and SPN processes, including documentation, routing, status tracking, follow-up and recordkeeping
- Work with sales, finance, operations, and other internal stakeholders to keep processes moving accurately and timely.

Executive & Companywide Meeting Support

- Assist with planning and preparing materials for leadership meetings, companywide meetings, internal presentations, and special projects or initiatives.
- Coordinate meeting agendas, presentation materials, meeting documents, follow-up items, and related internal communications.

New Client Setup & Systems Coordination

- Support new client setup, including client records, Teams channels and folders, communication channels, templates, and related access needs.
- Coordinate with the IT Administrator and internal departments to ensure setup is complete, organized, and timely.

Marketing Campaign Support

- Assist with marketing and sales campaign coordination, including target lists, materials, client tracking, reporting, and follow-up support.
- Help ensure campaign data and materials are accurate, organized, and current.
- Other duties as assigned.

QUALIFICATIONS:

- Prior experience in administrative, business operations, proposal coordination, marketing operations, or a similar role.

- Hands-on experience with dashboards; experience with reporting, pipeline tracking, workflows, or system administration strongly preferred.
- Strong technical aptitude and ability to learn and navigate multiple software applications and new systems quickly.
- Proficiency with Microsoft 365, including PowerPoint, Excel, Word, Outlook, Teams, and SharePoint/OneDrive.
- Strong Excel skills, including sorting, filtering, formulas, data cleanup, and report preparation.
- Excellent writing, editing, proofreading, formatting, and document organization skills.
- Strong organizational skills with the ability to manage multiple priorities, deadlines, and cross-functional requests.
- High attention to detail and accuracy, especially with data, presentations, and client-facing materials.
- Ability to work independently, take initiative, troubleshoot issues, and follow through.
- Professional judgment and ability to handle confidential client, pricing, sales, and leadership information.

Key Competencies:

- Systems-minded
- Technically confident and resourceful
- Highly organized and process-oriented
- Strong written communication skills
- Detail-oriented and deadline-driven
- Proactive self-starter
- Strong PowerPoint and reporting skills
- Cross-functional collaborator
- Comfortable supporting executives and sales leadership
- Able to bring structure and consistency to business processes
- Experience using at least one AI platform

This Position Description is intended to describe the general nature and level of work being performed by the person assigned to this position. "Key Responsibilities" are intended to describe those functions that are essential to the performance of this job. "Additional Functions" and the phrase ". . . other duties as assigned" include those responsibilities that are considered incidental or secondary to the overall purpose of this job.

This Position Description does not state or imply that the above are the only duties and responsibilities assigned to this position. Employees holding this position will be required to perform any other job-related duties as requested by management. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.