

Senior Manager, Business Advisor Engagement

(remote position)

ABOUT US

Project Equity grows community wealth by retaining successful local businesses through employee ownership transitions

Do you want to see a world where the average employee has economic security and businesses help build resilient communities? So do we!

Project Equity helps employees become owners of the businesses where they work. We raise awareness of employee ownership as a business succession strategy, provide support for businesses to transition to employee ownership and work in multiple regions throughout the country to create generative ecosystems in support of such work on an ongoing basis. Our early success and significant attention from media outlets such as *Forbes*, NPR and the *Washington Post* have positioned us as a national leader in the movement to harness employee ownership to maintain thriving local business communities, create quality jobs and address income and wealth inequality. Help us tap this incredible momentum!

YOUR ROLE

The Senior Manager, Business Advisor Engagement role is pivotal in expanding the reach and impact of Project Equity's professional learning products, ensuring they are adopted widely across key industries and institutions to scale employee ownership (EO) nationwide. This position will drive sales and marketing strategy for products developed in our service provider adoption (SPA) initiative. The SPA initiative provides accredited learning products on EO for business advisors, channel partners, enterprise accounts, and other audiences.

How you will help to expand employee ownership

As the Senior Manager, Business Advisor Engagement, you will work closely with our Senior Product Manager of SPA to refine and improve products based on market feedback and

competitive insights. This role will generate leads, optimize outreach strategies, close deals for enterprise licenses, secure channel and listing partners for revenue-sharing agreements, and expand individual seat licenses. Occasional travel may be required for in-person events and relationship-building. This position reports to the Director of Advancement and Partnerships.

RESPONSIBILITIES INCLUDE

Lead generation and outreach

- Develop and execute outbound sales and marketing strategies to generate leads for professional learning products from enterprise accounts, channel partners and individuals to build a pipeline of sales opportunities.
- Utilize CRM tools to track leads, monitor progress and maintain an accurate and up-to-date pipeline.

Relationship building and sales

- Develop work plans and KPIs focused on product sales, partnership development, and market engagement.
- Establish and nurture relationships with business advisors, enterprise accounts and channel partners to drive sales opportunities and expand market reach.
- Manage the sales cycle from initial contact through closing, including conducting demos, addressing customer needs, negotiating terms and finalizing agreement and tenure ongoing relationship management.
- Represent Project Equity at industry conferences, workshops and events to expand visibility and build connections.

Marketing and campaign development

- Collaborate with the marketing team to create and monitor compelling sales collateral, outreach campaigns and presentations tailored to target audiences.

Product development and feedback

- Provide regular updates to internal teams about emerging trends, client needs and opportunities in the field of professional learning.
-

- Identify opportunities for growth to scale the impact of professional learning products.
- Gather and share feedback on the effectiveness of learning products and participate in product development discussions and competitive analysis to ensure products remain relevant and differentiated.

Collaboration and reporting

- Prepare and deliver regular reports on outreach metrics, pipeline status and partnership outcomes.
- Activate learning product customers as potential referral pipeline sources for business EO transitions.

AREAS WHERE YOU SHINE

- **You're passionate about advancing EO.** You care about creating systemic change and see the value in spreading knowledge about EO as a viable business succession strategy.
 - **You thrive in sales environments.** You enjoy managing the full sales cycle and are skilled at closing deals with various customer types, from enterprise clients to smaller firms.
 - **You're a relationship-builder.** You're skilled at building connections, networking, and engaging stakeholders across different sectors.
 - **You're proactive and self-motivated.** You take initiative to identify new opportunities, refine strategies based on feedback, and stay focused on achieving sales goals.
 - **You're a great communicator and presenter.** You can effectively explain complex concepts to diverse audiences, both in person and virtually, and can adapt your message to meet their needs.
 - **You're skilled at partnership development.** You can bring partners on board by aligning on shared goals and negotiating mutually beneficial agreements.
 - **You're collaborative and flexible.** You enjoy working closely with internal teams to align sales efforts with product development and marketing initiatives.
-

- **You're goal-oriented.** You focus on hitting targets and can adjust strategies based on market conditions and lessons learned.
- **You enjoy traveling.** You're comfortable with regular travel to participate in industry events and meet with partners in person.

KEY COMPETENCIES

- 3+ years of experience in sales, business development, or similar roles, particularly with a focus on enterprise-level sales (200+ employees), channel partnerships (national and state professional associations), or educational products
- Proficiency in CRM platforms and outreach tools
- Familiarity with accredited continued education (CPE / CLE) programs preferred
- Familiarity with EO, business transitions, or related fields is a plus

BENEFITS

- Medical (PPO, HSA, or HMO options where available), dental and vision coverage: employer covers 100% of employee premium and 30% for dependents
 - Dependent Care FSA
 - Employee Assistance Program
 - Basic Term Life, additional voluntary life for employee, spouse, and dependent children available
 - Short and long term disability
 - Voluntary Critical Illness, Accident, and Hospital Indemnity Insurance
 - Retirement 401K: A dollar for dollar employer match of the employee's contribution, up to 3% of gross wages and 50 cents on the dollar match for the next 1% (3.5% total match)
 - Generous holiday, vacation and sick leave.
 - Holidays: 15 days annually, which includes 2 floating holidays
 - Vacation: 15 days (years 1 - 4) & 20 days (year 5+)
 - Sick: 10 days annually
-

SALARY

\$85,000-\$112,000 annually

TO APPLY

[Fill out this form](#). Please be sure to include your resume and cover letter. In your cover letter please explain what motivates you to work with Project Equity, and how your experience, skills and commitment will advance our work to create a more equitable economy.

Learn more at project-equity.org.
