

## Lead, Business Development – Employee Ownership Acquisitions

### REPORTS TO

Senior Vice President, Head of Programs

**Project Equity grows community wealth by creating more equitable communities and a resilient future 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, especially those in low- to middle-wage jobs, become co-owners of the businesses where they work. We provide direct services to private businesses exploring and transition to employee ownership models.

### Help us innovate to the next level

In the eleven years since our launch, Project Equity has developed successful, replicable programs designed to scale and innovate transitions to employee ownership forms. As we look to the future, we believe there is more opportunity and innovation to come from marrying the best approaches from traditional M&A work with the best of the existing employee ownership field. With this role you can help us build toward that future.

### RESPONSIBILITIES AND DUTIES

The Lead, Business Development – EO Acquisitions role is pivotal in expanding the reach and impact of Project Equity's EO Transitions practice. This role will lead the development of our EO Acquisitions pipeline and ensure the organization is reaching business owners in the small and lower middle market space effectively and that our services are well understood in the marketplace.

### STRATEGY AND MANAGEMENT

- Work with Executive Leadership to further develop the strategy for pipeline development for EO services & acquisitions.
  - Support advancing PE ability to engage addressable M&A market with EO.
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- Bring strategy and tactics for traditional deal sourcing into the strategy.
- Lead execution and continuous refinement of the strategy.
- Develop work plans and KPIs for the team and individuals. Supervise and support team members to be highly effective.
- Work collaboratively with other department leaders to advance the strategy, especially Marketing and Client Services.
- Advance multiple work streams, balancing team and organizational priorities.

### **RELATIONSHIP BUILDING AND SALES**

- Become an expert communicator of Employee Ownership and Project Equity messaging.
- Stay up to date on industry trends, be knowledgeable about the competitive landscape and how Project Equity's products and services stand out.
- Build internal understanding of how employee ownership fits into the broader M&A landscape, including identifying and positioning EO as a credible, competitive exit path for small and lower middle market companies.
- Establish and nurture relationships with influential business associations, business community leaders, business advisors, and individual business owners.
- Effectively communicate the value of Project Equity's capital forward EO acquisitions services.
- Manage the sales cycle from initial contact through closing.
- Utilize CRM tools and marketing automation to track leads, monitor progress and maintain an accurate and up-to-date pipeline.
- Represent Project Equity at industry conferences, workshops and events to expand visibility and build connections.

### **MARKETING AND CAMPAIGN DEVELOPMENT**

- Collaborate with the marketing and communications team to create compelling sales collateral, outreach campaigns and presentations tailored to target audiences.
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- Work with Marketing to develop targeted marketing pipeline development approaches.
- Develop and execute targeted outbound sales and marketing strategies to build a pipeline of sales opportunities, together with Marketing and Executive team members.
- Monitor the effectiveness of campaigns and adjust strategies based on analytics and feedback.
- Contribute to the development of messaging that aligns with Project Equity's mission and elevates the value of professional learning products.

### **SERVICES DEVELOPMENT AND FEEDBACK**

- Work closely with PE's Client Services and Capital teams to continuously assess and refine our services based on the market.
- Provide regular updates to internal teams about emerging trends, client needs and opportunities in the field EO Acquisitions.
- Ensure seamless flow from sales closing to services execution working with the Client Services team.

### **TEAM LEADERSHIP**

- Ensure the team members are continuously and adequately prepared to deliver our sales messaging and are effective in both outbound and inbound processes.
- Support team members in developing and achieving sales goals.
- Mentor and coach team members to grow capacity for relationship sales cultivation and closing.
- Contribute to advancing PE's culture.

### **HOW YOU WORK**

- 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.
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- You're a natural coach and mentor. You care about your team and know how to provide means to advance their ability to learn and perform.
- You're a relationship-builder. You're skilled at building connections, networking, and engaging stakeholders across different sectors.
- You're skilled at partnership development. You can bring partners on board by aligning on shared goals and negotiating mutually beneficial agreements.
- 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. You can effectively explain complex concepts to diverse audiences, both in person and virtually, and can adapt your message to meet their needs.
- 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 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. Travel expectations of up to 25%.

## **KEY COMPETENCIES AND SKILLS**

- Proven business services sales experience with small and lower middle market businesses, 7+ years of experience in sales, business development or similar roles.
  - Demonstrable background in corporate finance and/or transaction deal structuring is required.
  - Strong communication, negotiation, and relationship-building skills, with the ability to engage diverse audiences.
  - Management of staff experience required.
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- MBA is a plus.
- Strong presentation skills with the ability to pivot approach mid-pitch based on reactions or feedback.
- Proficiency in CRM platforms and outreach tools.
- 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
- 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)
- Employee Assistance Program
- 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**

\$125,000 – \$150,000

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**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](https://project-equity.org).