

## POSITION DESCRIPTION

### Title

Lead, Business Development – Employee Ownership Acquisitions

### Reports to

SVP, 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. The Business Development team works to source EO transition deals. Those deals are then carried forward through the deal lifecycle by our Client Services team.

### **Responsibilities and duties**

The *Lead, Business Development – EO Acquisitions* is a key driver of growth for Project Equity's EO Transitions practice. This role leads the team responsible for identifying and sourcing qualified EO business acquisition opportunities in the small and lower middle market business segments. This individual will drive the team to proactively engage business owners, advisors, and other market influencers to build a robust pipeline of prospective EO transition candidates.

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The ideal candidate brings a strong background in business development, B2B sales leadership, or investment sourcing—paired with a passion for expanding employee ownership as a tool for business continuity, broader wealth diversification and a stronger, more resilient economy.

### **Strategy and management**

- Work with Executive Leadership to further develop the strategy for pipeline development for EO services & acquisitions.
- Bring strategy and tactics for traditional M&A deal sourcing into the strategy.
- Develop work plans and KPIs for the team and individuals. Support team members to be highly effective.
- 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.

### **Relationship building and sales**

- Become an expert communicator of Employee Ownership and Project Equity messaging, including the value of Project Equity's capital-forward EO acquisitions services.
  - Stay up to date on industry trends, be knowledgeable about the competitive landscape and how Project Equity's products and services stand out.
  - Help develop our 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, including representing us at events.
  - Utilize CRM tools and marketing automation to track leads, monitor progress, and maintain an accurate and up-to-date pipeline.
  - Ensure seamless flow from sales closing to services execution working with the Client Services team.
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## Team leadership

- Lead and coach team members responsible for outbound outreach and inbound inquiry response.
- Ensure 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.

## Marketing and campaign development

- Collaborate with the Marketing and Client Services teams to create compelling sales collateral, outreach campaigns, and presentations tailored to target audiences.
- Collaboratively develop and execute targeted outbound sales and marketing strategies to build a pipeline of sales opportunities and monitor the effectiveness of campaigns and adjust strategies based on analytics and feedback.

## 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.
  - **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.
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- **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.
- 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, small business exit planning, 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
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- 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

### 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).