

# RENEWAL SPECIALIST

## DETAILS

**Location:**  
Kennesaw, GA

**Salary Range:**  
Base + commission

**Position Type:**  
Full Time

**Contact:**  
Bridgit Lawhead,  
blawhead@ioufinancial.com

**Will Train Applicant:**  
Yes

**Travel Required:**  
None

## JOB DESCRIPTION

A consultative sales role in which you are responsible for the satisfaction, retention and renewal of IOU funding clients. Reporting to a sales Team Lead, you are a motivated and organized person who will enjoy interacting with a wide range of small business owners and taking a consultative approach to understanding their needs, building trust and selling loan renewals.

## RESPONSIBILITIES

- Manage your sales pipeline to drive a steady flow of customer interactions via phone, email and SMS – KPIs and targets to be defined with your Team Lead
- Establish client needs and deliver targeted communications:
  - Educate clients on loan repayment terms, costs and potential savings
  - Develop trust and gain an understanding of their business funding needs
  - Identify renewal opportunities and explore options to renew funding
  - Retain and renew clients who are ready to switch to another lender
- Prepare files for renewal by gathering and reviewing bank statements and ensuring that all pre-funding conditions are met, adding notes to the file to help with the closing
- Collaborate with the (internal) Account Executive to make any adjustments to the terms of the loan
- Submit renewal-ready files to Operations for closing
- Maintain detailed tracking of opportunities using spreadsheets and/or CRM software

## QUALIFICATIONS

- Previous sales experience is a strong asset; experience with business lending and/or consultative sales an asset
- Proficient in Microsoft Office suite and customer relationship management software
- Demonstrated ability to set goals and achieve them
- Strong communication skills and understanding of sales process

## ABOUT IOU FINANCIAL

*IOU Financial is a leading online lender specialized in helping small businesses with a healthy cash flow. Providing a unique approach to lending through an advanced, automated application and approval system, IOU Financial is able to accurately assesses applicants' financial realities. Small business loans are available of up to \$600,000 to qualified applicants in only 24-48 hours. Speed and transparency make IOU Financial a trusted alternative to banks. IOU Financial operations is based in metro Atlanta, Georgia with headquarters in Montreal, Canada and publicly traded (TSX-V: IOU). For more information, visit <https://IOUFinancial.com>.*

IF YOU ARE INTERESTED IN APPLYING, PLEASE EMAIL YOUR RESUME TO BRIDGIT WITH SUBJECT LINE:  
**RENEWAL SPECIALIST**