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Job title, keywords, or company

Where

City, state, zip code, or "remote"

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Sales Operations Analyst

YCharts 3 reviews

Remote

Remote

Full-time

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Job details

Job Type

Full-time

Remote

Benefits

Pulled from the full job description

- 401(k)
- 401(k) matching
- Dental insurance
- Flexible spending account
- Happy hour
- Health insurance

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Indeed's salary guide

- Not provided by employer
- \$70.2K - \$88.8K a year is Indeed's estimated salary for this role in Remote. ?

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Full Job Description

THE COMPANY:

Building and executing a great investment strategy shouldn't require a PhD, nor a million-dollar budget. It should be simple. The wealth management industry is rapidly evolving, and tech solutions like YCharts are paving the way for advisors and planners to scale their businesses.

YCharts enables its customers to make smarter investment decisions and better communicate with their prospects and clients. Our cloud-based software provides investment advisors, wealth managers, asset managers and retail investors with powerful research tools, comprehensive data, compelling visuals, and customizable sales collateral.

Thanks to our best-in-breed software and unparalleled support, YCharts has transitioned from a fintech startup to a thriving growth company (Inc. 5000 Honor Roll 6x Fastest Growing Company) in the burgeoning "wealth-tech" space. YCharts proudly services industry-leading names such as John Hancock, TD Ameritrade, Fidelity and Charles Schwab.

PRIMARY JOB RESPONSIBILITIES:

- Bridge the gap between marketing and inside sales, reporting to the Sales Operations Manager
- Facilitate the operational responsibilities involved with creating and enabling a top-performing sales development team
- Support lead routing initiatives from a sales lens, helping to increase productivity and efficiency amongst our inbound and outbound sales efforts
- Develop controlled, repeatable, and well-defined lead funneling processes

Company Info

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3 reviews

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and execute lead prioritization for sales

- Educate sales team members about lead assignments by leveraging data to help identify opportunities
- Work with the sales ops team to manage team bandwidth and promote Marketing Qualified Lead (MQL) to Sales Qualified Lead (SQL) conversion rates
- Partner with YCharts management and top-performing Account Executives to uncover business needs, design solutions, launch, iterate, and measure impact
- Leverage HubSpot as a primary source of truth and solutioning for improved sales operations across the YCharts organization
- Nice-to-have: HubSpot Certifications {e.g. Sales Software, Inbound Sales, Reporting, Revenue Operations, Frictionless Sales}

DAILY AND MONTHLY RESPONSIBILITIES:

- Executing MQL routing and assignments in Hubspot to sales and ensuring lead quality information is accurate to exceed performance targets
- Developing reports, dashboards and processes in Hubspot to continuously monitor data quality and integrity and execute data migration/cleansing projects as needed
- Reporting on daily lead generation activities, key accounts, and campaign effectiveness
- Updating Hubspot workflows and sequences with new marketing content on a consistent cadence
- Becoming a subject-matter expert with sales dialers and call queues for marketing initiatives including account-based marketing, events, webinars and more
- Improving quality enrollment results by evaluating processes and recommending changes to operational inefficiencies
- Additional similar job duties as required

*

YOU ARE: *

- Meticulous. Your attention to detail is unmatched
- Creative. Always looking for new, more effective ways to complete a project
- Organized. You know how to manage multiple projects and competing priorities to create an actionable plan and get the most impactful work done
- A self-starter. You're always ready to roll up your sleeves and jump on opportunities when you see them without being asked
- A true team player. You think across the full spectrum of channels available to us
- Data driven. You seek out data to inform your approach and constantly iterate on what you're doing based on what's working and what's not. Hubspot experience is a big plus!

*

Y CHARTS?: *

- 6x Inc. 5000 "Fastest Growing Companies"
- American Banker's 2020 and 2021 "#1 Best Fintechs to Work For"
- Built in Chicago's 2022 "Best Places to Work" and "Best Small Company to Work For"
- Inc.'s "Best Workplaces"
- Inc.'s "Top Regionals: Midwest"
- Crain's "Best Places to Work in Chicago"
- Deloitte's "Technology Fast 500"
- InvestmentNews' "Biggest Fintech Innovations"
- Technology Tools for Today & Inside Information's "Top Tool Advisors Are Thinking About Adding"
- 2022 Kitces Report's "Investment Data" market leader, #1 most-adopted in the last year, #2 in market share
- Business Intelligent Group's 2022 Best Places to Work
- WatersTechnology's Most Innovative 3rd Party Tech Vendor

PERKS & REC:

- Chicago (River North) & NY (Chelsea) offices with flexible remote options
- 100% Employer-covered medical, dental & vision insurance
- Flexible Spending Accounts (Healthcare and Dependent Care)

- 401(k) match
- Paid parental leave
- Discounted Pet Insurance
- Great Work/Life Balance: Generous PTO including: Vacation Days, Paid Holidays, Sick Days, Professional Education Days, and “Celebration Days”
- DEI commitment
- Continued education via “Starbucks and Study”
- Opportunity to join committees (Educational committee, DEI committee, Social Committee, Women at YCharts, and more!)
- Summer hours— we head out early during the warm months!

*

IN-OFFICE PERKS: *

- \$60/week Grubhub credits for in-office lunches
- Rotating selection of high-quality coffees
- Craft beer, kombucha, and cold brew on tap
- Snacks and drinks to get you through the day
- Opportunity to join team leagues like kickball
- Fun company outings including an annual celebration in Chicago, Whirlyball, community service, baseball games and happy hours!

YCharts provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

At YCharts, we feel strongly that respect and inclusion are essential ingredients for creativity, innovation, and success. While we know there's more work to be done to advance diversity and inclusion, we're proud of our success thus far and excited for the journey to come. Want to help us?

Learn more about our culture (video)

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Job Type: Full-time

Hiring Insights

Job activity

Posted 30+ days ago

YCharts
[original job](#)

If you require alternative methods of application or screening, you must approach the employer directly to request this as Indeed is not responsible for the employer's application process.

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Operations Analyst jobs in Remote

Jobs at YCharts in Remote

Operations Analyst salaries in Remote

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