

Sales Account Executive – Workbooks

Reporting to: Chief Revenue Officer

About the Role

We're looking for a driven and strategic Sales Account Executive to join Workbooks and play a key role in accelerating revenue growth. You'll be responsible for developing existing client relationships and executing a clear territory strategy to meet and exceed sales targets.

This is a hands-on role requiring a balance of business development and leadership, with the opportunity to shape how we engage mid-enterprise organisations and position our CRM solutions in the market.

Key Responsibilities

New Business Development

- Prospect and generate new business through networking, self generation, events, and marketing campaigns
- Develop persuasive sales approaches and tailored pitches
- Build strong relationships with prospective clients and key stakeholders, including C-level executives
- Identify client needs and position Workbooks' CRM solutions effectively

Revenue Generation & Growth

- Own and deliver against ARR and professional services targets
- Develop and execute a territory strategy, including account segmentation and prioritisation
- Maintain regular engagement with prospects and customers
- Work closely with the Sales Development Executives (SDR's)

Territory & Market Development

- Stay up to date with CRM industry trends and competitive positioning
- Work closely with Marketing to create targeted campaigns
- Contribute to sales messaging and collateral
- Represent Workbooks at events, conferences, and trade shows to build brand awareness and pipeline

Sales Management & Operations

- Produce accurate weekly and monthly sales forecasts
 - Maintain high-quality CRM data and pipeline hygiene
 - Ensure effective deal management and handover processes
 - Deliver high-quality product demonstrations aligned with Workbooks standards
 - Support and coach SDR's
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Performance Measures

- Achievement of ARR targets
 - Professional services revenue
 - Quarterly objectives and KPIs
 - Pipeline value, volume and required stages
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Skills & Experience

- **Sales Acumen:** Strong understanding of the full sales cycle, from prospecting to closing, in a SaaS based environment.
 - **CRM Expertise:** Solid knowledge of CRM platforms and their business value
 - **Communication:** Excellent verbal and written skills
 - **Relationship Building:** Ability to develop long-term, trust-based client relationships
 - **Problem Solving:** Analytical approach to understanding customer challenges and proposing solutions
 - **Negotiation:** Confident in closing deals that create mutual value
 - **Strategic Thinking:** Ability to develop and execute effective sales strategies
 - **Goal-Oriented:** Driven to meet and exceed targets
 - **Adaptability:** Comfortable operating in a fast-changing environment
 - **Technical Confidence:** Able to understand and present software solutions
 - **Presentation Skills:** Strong in delivering engaging demos and proposals
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What Success Looks Like

- Consistently achieving or exceeding revenue targets
 - Building a strong, sustainable pipeline
 - Developing high-value client relationships
 - Contributing to the growth and visibility of Workbooks in the CRM market
 - Supporting team performance and maintaining high sales standards
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Why work at Workbooks

Workbooks has recently received strategic funding and investment from BGF to accelerate our growth journey for which this role is key. The business is looking to triple in size by 2030, driven by its people and product, and demonstrated through its differentiated offering to the Mid-Market which has resulted in significant customer loyalty.

To recognise your contribution to this success the company offers the current package:

- Competitive OTE package
- Share Options potential so you benefit from the long term success of the business
- Strong benefits package including 25 days holiday plus your birthday, Life Assurance, Pension scheme, Benefits platform, LinkedIn Learning Account, and Employee Assistance Programme
- Reading office 3 days per week, WFH Wednesday and Friday, Lunch provided on Thursdays.