



Job Title: Sales Operations Executive
Department: Commercial Services
Division: Botanics Trading Company

Job Description

Main Duties
<ul style="list-style-type: none">• Sales Pipeline Management: Maintain and update the CRM system to track leads, opportunities, and conversions with accuracy and timeliness.• CRM System Oversight: Ensure the CRM is used effectively across the team, maintaining clean data, generating reports, and identifying opportunities for automation and process improvement.• Contracting & Documentation: Draft, issue, and manage contracts and sales agreements, ensuring all documentation is accurate and compliant.• Invoicing & Financial Admin: Generate and track invoices, liaise with finance, and ensure timely payments and reconciliations.• Client Communication: Serve as a professional and friendly point of contact for clients, providing timely responses and clear information via email, phone, and in-person.• Dynamic Site Inspections: Host engaging and informative site visits for prospective clients, tailoring each experience to their needs and showcasing the venue's potential.• Sales Reporting: Produce regular reports on sales performance, pipeline status, and revenue forecasts using Excel and CRM tools.• Team Collaboration: Work closely with Sales, Event Planning and wider team to support sales campaigns, promotions, and client engagement strategies.• Process Improvement: Identify and implement improvements in sales administration processes to enhance efficiency and client experience.

Person Specification



Skills/Aptitude	Essential	Desirable
Strong administrative and organisational skills with a sharp eye for detail	*	
Proficiency in Microsoft Excel, Outlook, Word, and CRM systems (e.g.Salesforce, HubSpot, or similar)	*	
Ability to manage multiple priorities and deadlines in a structured, proactive manner	*	
A confident, engaging personality with excellent communication skills	*	
A customer-first mindset with a drive to support business growth	*	
Comfortable leading in-person site inspections and building rapport with clients	*	.

Knowledge	Essential	Desirable
Experience in a sales support, sales operations, or administrative role	*	
Hands-on experience using CRM systems to manage sales pipelines and client data	*	
Familiarity with contracting, invoicing, and reporting processes	*	
Understanding of the Edinburgh corporate and events market		*

Professional Qualifications	Essential	Desirable
Educated to degree level or equivalent experience	*	