

JOB TITLE: Sales Operations Analyst

LOCATION: Oakville, ON (Full Time)

DEPARTMENT: Sales

REPORTS TO: SVP Marketing



ROLE OVERVIEW

The Sales Operations Specialist plays a pivotal role in supporting a high-performing sales organization. This analytical and operational position is responsible for coordinating and assisting the sales team to maximize productivity, improve performance, and ensure CRM excellence through Salesforce.

Working closely with the marketing team, this role helps strengthen messaging, enhance client servicing, and measure campaign impact – ensuring sales initiatives are aligned with broader business objectives.

This is a non-quota-carrying role ideal for someone who thrives at the intersection of sales operations, enablement, and strategic execution.

KEY RESPONSIBILITIES

- Oversee day-to-day operations of the national sales team
- Support leadership with territory structure, account prioritization, and national alignment
- Coordinate sales meetings, product training, and enablement initiatives
- Maintain clear communication flows between sales, marketing, product and investment teams for campaigns, launches, and account priorities
- Continuously refine sales processes, tools, and technology to maximize team efficiency and effectiveness

SALESFORCE LEADERSHIP & CRM STRATEGY

- Act as the Salesforce owner for the sales team, driving adoption and best practices
- Build and maintain dashboards, workflows, and reports to give leadership and sales clear visibility into pipeline health, activity levels, and team performance
- Identify and implement CRM workflow improvements to streamline processes and boost productivity
- Measure and report on sales funnel progression and pipeline acceleration

SALES ENABLEMENT

- Assist wholesalers and business development teams with pipeline discipline, lead follow-up best practices, and CRM usage
- Reinforce strategic messaging, prospecting approaches, and sales playbook adoption
- Provide ongoing support to elevate team performance and consistency in execution
- Establish structured feedback loops between sales, product, and marketing teams to continuously refine campaigns, positioning, and client engagement strategies

SALES INITIATIVES & MARKETING PARTNERSHIP

- Coordinate the distribution and usage of sales enablement materials, product collateral, and presentation resources to align messaging across teams
- Collaborate with marketing to identify and leverage high-performing content and events that drive meaningful client conversations and business outcomes

OPERATIONAL EXCELLENCE

- Streamline internal processes to enhance team efficiency and accountability
- Standardize CRM workflows and reporting structures
- Collaborate with internal stakeholders (Sales, Marketing, Product, Compliance, Operations) to align account coverage and strategy
- Support the preparation of sales presentations, quarterly business reviews, and strategic planning materials
- Manage event & logistics for branch presentations and advisor events, including coordination with marketing, venue logistics, and follow up

QUALIFICATIONS

- 5+ years of experience in sales operations, CRM management (Salesforce Certified Business Analyst), or account coordination within financial services or asset management
- Advanced hands-on experience with Salesforce (reporting, dashboard building, workflow automation)
Proven experience enabling sales teams
- Strong understanding of the Canadian wealth management and advisor distribution landscape
- Demonstrated ability to bridge sales and marketing functions to drive measurable impact
- Strong organizational, analytical, and communication skills

Interested applicants please forward their resume with a cover letter to resumes@harvestetfs.com.

We thank all applicants in advance for their interest, but only those candidates shortlisted for interviews will be contacted.

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