



Sales Analyst

Full-Time Position – Remote, NY or Boston preferred

Micruity helps Americans retire securely

Micruity operates the data infrastructure that recordkeepers, life insurers, and asset managers use to power lifelong financial security for the over 100 million Americans in employer-sponsored savings plans. The Micruity platform facilitates frictionless data sharing between all stakeholders through a single point of service, lowering the administrative burden and enhancing the user experience of retirement income solutions. In partnership with firms like Fidelity, MetLife, and State Street, Micruity has demonstrated that technology will unlock all Americans' access to a paycheck in retirement.

Micruity has the talent and financial backing to succeed

With backing from leading investors in the InsurTech and FinTech space and a management team with almost 50 years of collective entrepreneurial experience, Micruity has the expertise it needs to revolutionize the retirement industry in a meaningful way.

We want to build with big thinkers, hard workers, self-starters, and transparent communicators. Our team takes pride in tackling lofty goals, then rewarding our accomplishments with a happy hour or get together at an industry event. Not a requirement, but nerding out over math happens often.

Who we're looking for

Micruity is seeking a highly motivated junior sales analyst to join our dynamic, collaborative, and rapidly growing team. In this role, you will play a key part in supporting a range of sales initiatives that drive growth and optimize business opportunities.

What you'll do

The essential functions include, but are not limited to the following:

- **Sales Support**
 - Maintain a weekly sales report to track upcoming sales meetings, including scheduling, agenda creation, and material preparation
 - Maintain and update sales presentations and other marketing materials
 - CRM maintenance and reporting

- Keep CRM up-to-date by capturing sales contacts, account information, activity, opportunity notes, tasks, and follow-ups
 - Create and maintain a task report to track follow-up requests and next steps for pipeline opportunities
- **Industry Research**
 - Track industry publications and news to stay informed about key announcements and product launches
 - Analyze market trends and maintain a competitive analysis
 - Track target organizations from industry sources and LinkedIn to expand contact database
 - Gather data to support strategy development for new sales channels
- **Marketing Content Development**
 - Collaborate with team to support a quarterly newsletter and other marketing materials
 - Draft content-driven LinkedIn posts
 - Develop lead-generation campaigns to build a marketing funnel and sales pipeline
 - Provide support for Micruity-led client events (virtual and live), which may include managing attendee lists, organizing materials, assisting with logistics, and follow-ups
 - Maintain up-to-date content on the Micruity website

Requirements

- 2 - 3 years of financial services industry experience (required)
- Exceptional communication and interpersonal skills
- Ability to excel in a fast-paced, demanding environment
- A self-starter with a high attention to detail and the ability to handle multiple projects and deadlines
- Strong organizational and time management skills
- Collaborative mindset to interact effectively with business partners and team members at all levels of an organization
- Ability to work independently and as a strong individual contributor within a team environment
- A track record of successfully managing projects
- Creative problem-solving skills
- Familiarity with CRM tools, such as Salesforce, HubSpot, and Marketo
- Proficiency in Excel, PowerPoint, and the rest of the Microsoft Office Suite
- Strong work ethic and willingness to take initiative
- Demonstrated ability to multitask and execute on key priorities
- Willingness to work nights and/or weekends on an as needed basis
- Ability to legally work in the US

Great to have

- 2 - 3 years of experience in defined contribution or broader retirement market
- Startup experience
- Experience working with recordkeepers, life insurers, and/or asset managers

Benefits

Micruity is growing quickly, and we are continuously looking for more ways to show our appreciation to our dedicated team members. We offer competitive health coverage, a generous vacation policy, occasional happy hours/lunches/outings and a hybrid or remote work environment.

Equal Opportunity

Micruity celebrates and supports difference and recognizes that having a diverse workforce benefits our employees, our products, our culture and the communities in which we work. Micruity is an equal opportunity employer, and employment decisions are based solely on a person's qualifications and merit as directly related to professional competence. We are dedicated to reaching a diverse candidate pool and hiring the person who is the best fit for the job. Micruity does not discriminate based on race, citizenship, ancestry, creed, color, religion, sex, gender, sexual orientation, gender identity/expression, national origin, age, disability, genetic information, veteran status, marital status, pregnancy or related conditions (including breastfeeding), or any other basis protected by law. Accommodation will be provided during the hiring process for qualified candidates.

We also consider qualified applicants regardless of criminal histories, consistent with legal requirements.

Micruity's EEO policy has the full and complete support of the Company, including its Chief Executive Officer and Board.