Designation: Lead Inside Sales

**Company Profile :**

Asset Vantage was founded in 2011 by a family office and technology group as a next-generation, SaaS technology-based asset management, accounting, and reporting system catering to the highly demanding needs of customers ranging from individual wealth holders to fully staffed family offices and those professionals that serve them. ***Our vision is to empower families and their trusted advisors to make better investment decisions with a complete picture of their wealth.***

Our fully configurable family office software platform provides financial data aggregation across all asset types, an integrated general ledger for accounting/reconciliation and comprehensive portfolio reporting/analytics across all asset classes, currencies, advisors, and geographies.  
***We are the one-stop software solution to help family offices run like a business.***

350 of the world’s wealthiest families, representing combined assets of over USD 400 Billion in value, use our platform to automate their operations to drive better financial outcomes. We serve them through single-family offices, multi-family offices, CPA firms, trusts and financial institutions. ***AV has the distinction of being the only platform that’s truly global serving users across the Americas, UK, Middle East, Asia, and Oceania.***

AV’s best-in-class technology, combined with its premium managed services, offers an unparalleled and highly configurable solution at a fully transparent and competitive price point. ***The holy grail of value that family offices have always been searching for is now here.***

For more information, visit [www.assetvantage.com](http://www.assetvantage.com)

**Job Roles and Responsibilities :**

Asset Vantage is looking for a highly motivated **Lead Inside Sales** to join our team. In this role, you will be responsible for managing a team of inside sales representatives, while actively driving lead generation, prospecting, and new business development for our innovative SaaS-based WealthTech solutions. This is an opportunity for a results-driven sales professional with leadership skills who is looking to grow in SaaS sales.

* **Team Leadership:** Manage, coach, and motivate a team inside sales representatives to ensure high performance and target achievement.
* **Lead Generation:** Proactively reach out to potential customers through outbound calls, emails, and LinkedIn.
* **Prospecting & Qualification**: Identify and engage decision-makers; qualify leads based on procurement needs and potential fit**.**
* **Pipeline Management:** Oversee and maintain accurate lead/opportunity data in CRM, ensuring the team follows best practices.
* **Collaboration:** Work closely with marketing to follow up on inbound leads and improve lead conversion rates.
* **Target Achievement:** Consistently meet or exceed individual and team KPIs for lead generation and qualified opportunities.
* **Market Research:** Stay updated on WealthTech industry trends, client needs, and competitor offerings to sharpen sales strategy**.**
* **Reporting:** Provide regular updates on team performance, pipeline health, and lead conversion metrics to management.

**Technical Skills :**

* 4-8 years of inside sales experience, preferably in SaaS, or WealthTech software.
* Strong communication skills with the ability to engage decision-makers.
* Experience in CRM tools.
* Proven ability to generate and qualify leads in a B2B setting.

**Personality and Interpersonal Skills :**

* Self-motivated, target-oriented, and comfortable in a fast-paced sales environment.
* Excellent verbal & written communication skills in English
* Soft Skills (Pitching, Probing, Objection Handling, Rapport Building)
* Strong, in-depth analytical skill
* Proficient in professional business conversational etiquette
* Account Mapping ability
* Networking & Team Management

**Qualification:**

**MBA**- Finance or equivalent

**Location:**

**Mumbai**

**Working Days:** - Monday to Friday in work from office mode