Job description

Job title	Sales Executive		
Job number		**Grade**	6DS
Directorate	Development and Regeneration	**Department**	Sales and Marketing
Reports to	Sales Manager	**Date effective**	May 2026

Purpose

To proactively manage and convert customer enquiries across a portfolio of new build and second hand shared ownership, staircasing, buy backs, Right to Buy and Right to Acquire transactions.

The Sales Executive is responsible for driving sales performance through effective lead management, consistent follow-up and strong pipeline control, delivering an excellent customer experience from initial enquiry through to completion, while ensuring all activity is compliant with regulatory and governance requirements.

Key responsibilities/ deliverables

Lead Management & Conversion

1. Act as the first point of contact for all enquiries across all sales products
2. Proactively manage and follow up all leads to maximise conversion and meet individual sales targets
3. Ensure all prospects are actively progressed, with clear next steps and consistent follow-up
4. Take ownership of converting enquiries through to securing the transaction, maintaining momentum throughout

KPI & Activity Performance

5. Deliver against daily, weekly and monthly KPIs including conversion rates, response times, pipeline progression and customer satisfaction
6. Maintain high levels of outbound and inbound activity to drive performance
7. Monitor personal pipeline and take action to address delays or risks to conversion

CRM & Pipeline Management

8. Maintain accurate, up-to-date records of all customer interactions and activity within the CRM system
9. Ensure all prospects, activity and pipeline stages are clearly recorded and visible at all times
10. Use CRM to manage workload, prioritise activity and ensure no opportunities are lost
11. Maintain high standards of data quality and consistency across all transactions

Customer Journey & Experience

12. Deliver a professional, responsive and customer-focused service at all stages of the sales journey
13. Clearly explain processes, eligibility criteria, valuations and timelines to customers
14. Manage expectations effectively and maintain regular communication throughout
15. Conduct viewings, open days and virtual appointments where required

Sales Progression & Transaction Management

16. Work closely with Sales Coordinators/Progressors to ensure smooth and timely progression
17. Liaise with solicitors, mortgage advisors and purchasers to resolve issues and maintain momentum
18. Support preparation of transactions, paperwork and approvals

Affordability, Eligibility & Allocation

19. Support affordability assessments in collaboration with Financial Advisors
20. Manage nomination and allocation processes in line with Local Authority and s106 requirement
21. Ensure all customers meet eligibility criteria and are prioritised appropriately

Compliance & Governance

22. Ensure all sales activity is compliant with internal policies, regulatory requirements and audit standards
23. Maintain accurate and complete documentation for all transactions, aligned with CRM records
24. Adhere to key requirements including Anti Money Laundering, Data Protection and the New Homes Quality Code
25. Ensure all processes are followed consistently across all transaction types

Team Contribution & Continuous Improvement

26. Contribute to team meetings, performance reviews and feedback sessions
27. Share insight on customer trends, feedback and local market activity
28. Support continuous improvement of processes and customer experience

Professional Standards

29. Represent the organisation professionally at all times
30. Uphold brand values and maintain high standards of presentation and conduct
31. Attend all required meetings and training sessions

Line management
Direct reports*: None* Indirect reports: *None*

Key internal contacts

Key external contacts

Operating environment/dimensions	
Customer base:	
Job persona:	Site based/Hybrid/Mobile
Delegated authority limit:	£
Budget:	
DBS level:	Basic/ Standard/ Enhanced
Contract management:	
KPIs:	
Mandatory training:	

Qualifications and training	**Essential (Y)**	**Desirable (Y)**
Educated to GCSE level or equivalent in Maths and English (Grades A*- C)	Y	

Knowledge and skills		
• *In depth understanding of some or all of the following - shared ownership, resales and staircasing* • *Knowledge of Homes England requirements, Right to Buy/Right to Acquire legislation, and Shared Ownership processes.* • *A proven track record of over achieving sales and KPI targets within the property industry and across Shared Ownership for a period of at least one year* • *Demonstrable experience of working within a customer focused organisation and having a direct impact on customer satisfaction for a period of at least one year* • *Experience of competently utilising CRM systems to manage customer communication and record keeping.* • *A good level of computer literacy and numeracy along with attention to detail and analytical skills.* • *A passionate sales driven individual who possesses good communication, objection handling and negotiation skills.* • *Experience of understanding and offering insight and suggestions on a wide range of products and pricing.* • *Self-motivated with the ability to cope and maintain new business development focus during quiet, seasonal periods.* • *Proven/ demonstrable ability to build rapport/ relationships with a range of individuals* • *Results orientated and capable of flourishing in a competitive environment*		
Behaviours for success		
Influential •		
Engaging •		
Performance focused •		

This job description outlines the main responsibilities and requirements of the job. Colleagues are expected to comply with reasonable management requests to carry out additional or alternative duties.