



Position Description	<i>Inside Sales Representative (ISR)</i>
Status	<i>Full-Time</i>
Department	<i>Sales</i>
Reports to	<i>Sales Manager</i>

Core Values

Humbly Confident - Trusted Teammate - Service Driven - Strategic Innovation - Growth Mindset

Job Summary

The Inside Sales Representative (ISR) is an associate-level sales position responsible for supporting the growth and success of Bodhi Brands' existing retail accounts through exceptional customer service, proactive account management, and data-driven sales support. This role partners closely with the outside sales team to increase revenue, improve ordering consistency, and strengthen long-term customer relationships through the Bodhi Replenishment Service (BRS) program.

The ISR serves as the primary or secondary internal point of contact for assigned customers, ensuring timely communication, order management, customer satisfaction, and accurate CRM documentation. This position plays a critical role in supporting the sales organization by maintaining account health, analyzing sales trends, coordinating BRS activities, preparing sales reporting, and providing operational support that enables the outside sales team to focus on new account development and strategic growth.

Key Responsibilities

5 Core Responsibilities

1. **Customer Success & Account Support**
2. **Bodhi Replenishment Service (BRS) & Order Management**
3. **CRM, Reporting & Sales Insights**
4. **Sales Team Coordination & Cross-Functional Support**
5. **Continuous Improvement & Professional Development**

Key Duties & Expectations

Customer Success & Account Support

- Serve as the primary or secondary point of contact for assigned retail accounts, delivering timely, accurate, and professional customer support based on the account coverage model.
- Partner closely with Sales Account Representatives to support indirect accounts while independently managing customer relationships for assigned direct accounts.
- Build strong customer relationships through proactive communication, follow-up, and exceptional service to increase customer satisfaction and account retention.
- Collaborate with Sales Account Representatives to identify opportunities for growth, improve account engagement, and deliver a seamless customer experience.
- Respond promptly to customer inquiries, resolve operational issues, and coordinate internally to ensure timely solutions.
- Escalate strategic growth opportunities, complex customer concerns, or relationship issues to the Sales Account Representative or Sales Manager when appropriate.

Bodhi Replenishment Service (BRS) & Order Management

- Manage assigned accounts through the **Bodhi Replenishment Service (BRS)**, helping customers maintain consistent inventory levels and ordering cycles.
- Maintain and manage the BRS pipeline by monitoring account activity, identifying reorder opportunities, and ensuring assigned accounts remain engaged and on schedule.
- Process and manage customer orders accurately and efficiently while ensuring alignment with current pricing, promotions, and company policies.
- Review historical sales data, inventory movement, and purchasing trends to prepare reorder recommendations and identify opportunities for incremental account growth.
- Coordinate closely with the Sales Account Representative, Fulfillment, and Operations teams to ensure smooth order flow and proactive customer communication.
- Maintain organized documentation related to customer orders, pricing updates, promotions, and account activity.

CRM, Reporting & Sales Insights

- Maintain accurate customer information, activity notes, account history, and sales opportunities within HubSpot CRM.
- Generate and maintain sales reports, BRS reports, reorder analysis, and account performance dashboards to support leadership and the sales team.
- Prepare reports, presentations, and account summaries for leadership meetings and Quarterly Business Reviews (QBRs).
- Analyze customer purchasing trends and sales data to identify opportunities that increase account performance, ordering consistency, and revenue.
- Ensure CRM data integrity and support accurate forecasting through timely documentation and follow-up.

Sales Team Coordination & Cross-Functional Support

- Partner closely with Sales Account Representatives to support account strategy, customer communication, and seamless account management.
- Collaborate with Marketing, Operations, and Fulfillment to ensure alignment on product availability, promotions, and customer initiatives.
- Communicate customer feedback, market insights, operational challenges, and growth opportunities to the Sales Manager and Sales Account Representatives.

- Support the successful execution of sales initiatives, department priorities, and customer programs across the organization.
- Contribute to a collaborative team environment by providing timely communication and dependable operational support.

Continuous Improvement & Professional Development

- Identify opportunities to improve customer experience, sales processes, reporting, communication, and operational efficiency.
- Maintain a strong working knowledge of Bodhi Brands' products, pricing, promotions, policies, and sales programs.
- Participate in ongoing sales training, EOS development, team meetings, and professional development initiatives.
- Demonstrate Bodhi's Core Values through daily interactions with customers, teammates, and cross-functional partners.
- Continuously seek opportunities to improve personal performance while contributing to the long-term success of the sales organization.

Qualifications

Education

- High school diploma or equivalent required; associate's or bachelor's degree in Business, Marketing, Communications, or related field preferred.
- Associate's or Bachelor's degree preferred.
- Must read continuing education books:
 - What the *Heck is EOS?*

Suggested (optional growth reading):

- *Traction or Get A Grip*
- *How to Be a Great Boss*
- *The Five Dysfunctions of a Team*

Experience

- 3+ years of successful Inside Sales experience in a metrics-driven environment – or equivalent relevant real-world experience.
- Proven track record of meeting or exceeding sales and service goals.
- Excellent communication (verbal and written), organization, and follow-through.
- Strong analytical and problem-solving skills with attention to detail.
- Proficiency in Google Workspace (Sheets, Docs, Slides, Calendar, Meet).
- Experience with CRM platforms (HubSpot preferred) for data management and reporting.
- Ability to multitask, prioritize, and manage time effectively in a fast-paced environment.
- Team-oriented, proactive, and comfortable supporting multiple departments.

Professional Skills

- Strong organizational skills with the ability to manage multiple accounts and deadlines.
- Solid understanding of the sales process, order flow, and account retention techniques.
- Familiarity with B2B or retail sales models and customer lifecycle practices.

Interpersonal & Soft Skills

- Strong relationship-building ability with a customer-first mindset.

- Self-motivated, adaptable, and able to work independently with minimal supervision.
- Positive attitude, professionalism, and a high level of emotional intelligence.
- Collaborative team player who contributes to group success and supports peers.

Additional Requirements

- Must have a valid driver's license and reliable transportation for in-person store visits (if required by territory).
- Ability to occasionally lift up to 25 lbs for product samples or trade materials.
- Flexible schedule to accommodate customer needs, occasional travel, or store visits.
- Willingness to comply with all state and company cannabis sales regulations, including confidentiality and data integrity standards.

Working Conditions

- This role is primarily office-based (on-site or remote/hybrid depending on company policy), focused on computer and phone-based work.
- Requires extended periods of sitting, typing, and using a computer, phone, CRM, and Google Workspace tools.
- May include occasional in-person store visits, vendor meetings, or events depending on territory needs (typically low travel).
- Must be able to lift up to 25 lbs for transporting product samples, swag, or trade materials when needed.
- Work hours follow standard business hours but may require occasional flexibility to meet customer or team needs.
- Fast-paced environment with frequent communication, multiple deadlines, and shifting priorities.
- Must adhere to all Washington State cannabis regulations and company compliance standards.
- Must have reliable transportation for any required regional travel (minimal but possible).
- Role requires professional communication via email, phone, video meetings, and internal messaging platforms.

Disclaimer

The information presented indicates the general nature and level of work expected for the described position above. It is not designed to contain, nor to be interpreted as, a comprehensive inventory of all duties, responsibilities, qualifications and objectives required of employees assigned to this position. Rather, they are intended only to describe the general nature of the position.