

## **Futuregrowth has a vacancy for a CRM (Client Relationship Management) System & Process Manager**

*Futuregrowth, South Africa's leading fixed-income and developmental asset manager, has an opportunity for a Client Relationship Management (CRM) System & Process Manager. Candidates should be passionate about process creation and management, data integrity, client relationship management systems, and also possess relevant experience and skills – including strong technology experience, communication and interpersonal skills, leadership, and be highly organised and adaptable. Candidates should be able to work closely within a team and be able to interact at all levels of the organisation and with service providers.*

*Candidates must have a strong ethical base, and a positive, can-do, attitude with the ability to work under pressure. Futuregrowth is committed to transformation, and strong preference will be given to suitably qualified previously disadvantaged candidates. The position is based in Cape Town.*

### **Context**

The primary focus of the incumbent will be to develop and manage the implementation and operation of the CRM system and the effective use of client data and intelligence to support the business – notably the business development area, but more broadly the firm's range of relationships (e.g. clients, journalists, deal contacts). This will include:

- Developing a CRM vision;
- Leading organisational change (and creating accountability) in how staff engage and interact with CRM;
- Creating and managing processes and systems to mobilise teams across the business to ensure that relevant data is captured in the CRM system in a consistent, accurate manner;
- Turning "information" into "data" which can be used in a systemic manner; and
- Using the data to influence the organisation's relationships – notably with current and prospective clients (and their service providers).

For the Business Development area, this should aid in the retention of existing clients; assist with product development; aid the identification and conversion of client and market needs into business opportunities for the organisation; and assist in managing all client-facing staff.

### **Purpose**

- To develop and implement effective CRM processes, protocols and strategies across the organisation, with an initial primary focus on servicing the business development function;
- To enable the effective use of a CRM system to build strong client and stakeholder relationships, including growth of clients, contacts and business relationships;
- To create, consolidate and maintain various management reports, distribution lists, action lists, activity reports, opportunity reports, exception/warning reports, etc;
- To optimise workflows for relationship management across the organisation;
- To identify and execute an active pipeline management process and to provide insights to the new business team on opportunities;
- To have oversight of various organisational initiatives and how that could impact CRM, and to improve the support functions in the business; and

### **Directors**

GL Gobodo (Chairman) PE Rackstraw (Managing Director) AC Canter\* H Beets\*\* H George\*\*\* DM Lerutla

\*American \*\*Dutch \*\*\*British

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- To use CRM to assist in mobilising a wide range of staff members in engaging with clients and contacts.

## Reporting line

- The CRM System & Process Manager will report to the Chief Executive Officer (CEO) and Chief Investment Officer (CIO).

## Key result areas

- Build a comprehensive and high-functioning CRM system, process and culture;
- Mobilise the relevant teams in the organisation to ensure data/info/insights regarding client interactions are captured in the system and used effectively across the organisation;
- Potentially manage a small team of CRM specialist/s;
- Be able to manage outsourced service providers to ensure the CRM system is specified, sourced, implemented and updated for purpose;
- Be able to work with a software development team (internal or external) to implement, maintain and improve systems;
- Be able to perform a role in change-management to embed a CRM culture in the firm;
- Be curious and learning, seeking new tools, thinking and methods, which can be brought back into the firm;
- Hold all client-facing staff accountable for their role in information gathering, relationship building, follow-up actions, data gathering and data integrity;
- Ensure that the CRM system and information is being used effectively to:
  - o manage staff engaged in CRM work;
  - o inform strategy and tactics;
  - o help identify new business opportunities (e.g. clients, products, markets);
  - o proactively identify clients at risk and/or address client concerns, and
  - o help build the Futuregrowth brand (e.g. event management, list management, broader relationships, etc.).
- Ensure that the CRM system is able to be utilised to facilitate the following:
  - o Be an "information trap" for all relevant client and business opportunities and contacts – transforming information, opportunities and relationship engagements into useable, scalable data which can be managed, reported upon and followed-up upon;
  - o Ensure we can have "personalised relationships" in large scale with thousands of individual contacts;
  - o Ensure that all information about every business relationship resides with the firm, and not with individuals;
  - o Ensure the CRM system controls/reports-on processes and protocols to manage the business development and client-service cycle (pre-meeting, meeting, recognition building, relationship cementing, pitching and client servicing);
  - o Capture all client events, activities, information and actions in a comprehensive, reportable and managed manner;
  - o Create reporting, follow-up support, activity lists, activity reports, task lists and prospect management for all client-facing staff;
  - o Ensure workflow tasks are captured (opened), managed, and closed in an efficient and trackable process;

- All recorded activities in CRM should generate relevant data (reporting) for regulatory purposes (e.g. FAIS, compliance);
- Glean market and sales insights opportunities from data;
- Help manage fund raising by tracking relevant prospects/interested parties for each product;
- Help manage the development and maintenance of a sustainable new business pipeline;
- Help manage the tactics and strategies with the Business Development team to grow strong and enduring relationships with existing clients;
- Facilitate the development of strategies to sow new business from the existing client base;
- Guide the Futuregrowth team to manage business at risk;
- Deal effectively with any relationship crises which arise (e.g. communications, performance);
- Consolidate reporting requirements for various teams;
- Snapshot of key metrics on health of client relationships – visits, risk levels etc.;
- Management of client event lists and debriefs post-event;
- Maintenance of distribution lists for information, reports, press releases, etc.;
- Maintenance of contract and correspondence repository – ensuring all documentation is filed electronically in an efficient, accessible, and structured manner, and that information is accurate and up to date;
- Ensure easy access to tools, data, and documents for client facing staff;
- Ensure client reports and communications are sent in an orderly, systematic, and correct manner; and
- Ensure CRM system is able to interact with other relevant Futuregrowth systems to support client relationships.

## **Technical and professional knowledge and experience**

- BCom degree or equivalent, preferably with advanced degree or credential in financial services;
- Extensive experience (e.g. 5+ years) in developing and managing a CRM system;
- Understanding of financial services, products, asset classes and markets would be advantageous;
- Experience with relational databases (MySQL or similar), data integration, design of business intelligence tools would be an advantage;
- Experience in client relationship management, marketing and client services;
- Experience in managing and leading staff (both leading a team and facilitating processes across teams) [2+ years];
- Computer literacy in MS Office;
- Experience in Data Analytics preferred, and
- Project Management skills.

## **Competencies**

- Leadership and management skills;
- Fostering collaboration and teamwork (including ability to manage a direct team, as well as manage across levels in the organisation [from CEO/CIO downward]);
- Gaining commitment (persuading, negotiating and mobilising others);
- Change Management skills;
- Building and maintaining relationships;
- Valuing diversity and difference;
- Displaying intellectual curiosity, and a willingness to learn;

- Communicating effectively (written, verbal and presentation skills);
- Demonstrating ethics and integrity;
- Tolerance for ambiguity;
- Analytical thinking;
- Innovative thinking;
- Accuracy and attention to detail;
- Displaying drive and purpose;
- Resilience and adaptability;
- Excellent planning and organising skills;
- Client focus;
- Strong organisational skills;
- Problem solving;
- Open and accepting to constructive feedback;
- Drive to always want to improve; and
- Learning agility.

## **Closing date**

TBC

Please forward detailed CV and copies of ID and transcripts to [nsteenkamp@futuregrowth.co.za](mailto:nsteenkamp@futuregrowth.co.za).