

**May 2021**

## **Futuregrowth Asset Management is recruiting!**

We have an exciting opportunity available in our Business Development team.

*Futuregrowth is committed to transformation. A strong preference will be given to suitably qualified previously disadvantaged candidates.*

### **Business Development (BD) Operations Manager**

Are you passionate about investments and are you seeking a rewarding career in fiduciary asset management? Do you have strong communication and interpersonal skills, with the ability to build client relationships? Are you highly organised and adaptable, with a strong ethical base? Then this position might be for you.

### **Who is Futuregrowth?**

Futuregrowth has been South Africa's leading Fixed Income manager for more than 20 years, with around R186 billion of clients' assets under management (as at 31 December 2020). We manage funds across the full range of fixed interest and development funds and play a leadership role in the asset management industry in South Africa. We are committed to investing our clients' funds in a responsible manner, with the interests of our clients always coming first. Futuregrowth is based in Cape Town.

### **Purpose of position**

As part of a team, the successful incumbent will ensure smooth and efficient service delivery by managing and giving direction to those providing operational support to the Business Development team.

### **Key responsibilities of the position**

1. Supporting the client-facing staff with operational requirements, as part of the Business Development team.
2. Project managing key Business Development strategic initiatives (such as competitor analyses, pricing initiatives, etc.).
3. Assisting with the design of an end-to-end client engagement process and ensuring that it is maintained once implemented.
4. Customer Relationship Management (CRM) data quality management. This includes:
  - CRM sanitisation and updating of client information;
  - CRM communication and mailing list requirements;
  - Growing the CRM database with new client data; and
  - Monitoring the completion of meeting notes and follow-up actions.
5. Coordinating client communication. This includes:
  - Evaluating and assessing the communication requirements with client-facing team members and the investment team;
  - Coordinating the drafting and effective, timeous distribution of client communications with the BD Operations team;
  - Evaluating and distributing client queries to relevant staff to resolve; and
  - Engaging with Marketing about the distribution of Marketing-related client communications.
6. Coordinating BD client roadshows and events with Marketing, BD managers and the BD Operations team. This includes:
  - Engaging with Marketing on the types of events required to meet the Sales and Retention strategy as directed by the client-facing team;
  - Ensuring that the targeted clients and consultants are invited; and

- Managing the client invitation process.
  - Overseeing preparations for client engagements (supporting the client-facing team) that includes facilitating the completion of client preparation sheets for key client engagements.
7. Business Development team reporting. This includes:
- Coordinating the Retention and New Business reports from team members to include in the Exco/Board reports from Business Development;
  - Completing the following reports:
    - o Sales reports;
    - o Transactions reports;
    - o Client activities;
    - o Business Intelligence, i.e. BD analysis reports;
    - o Project status reports; and
    - o Reports for the Investment team.
8. Managing and collaborating with the Business Development Operations team members to meet the requirements of the Business Development processes.

## **Knowledge and experience required**

### *Skills, know-how and experience*

- Understanding of the Business Development environment;
- Excellent report writing skills;
- Project management experience in scoping and implementing projects; and
- Client engagement experience within the financial services.

### *Technical/professional qualifications*

- Post-graduate qualification; and
- 2 to 3 years' minimum current and relevant experience in the investment industry.

### *Key behaviours and competencies*

- Display high energy levels with a "can do" attitude;
- Enjoy collaboration and teamwork;
- Have excellent communication skills (verbal and written);
- Have excellent listening skills with strong emotional intelligence;
- Have strong negotiation skills;
- Have excellent planning and organising skills;
- Have strong analytical skills;
- Pay high attention to detail;
- Display good decision-making and judgement;
- Be articulate and confident;
- Be disciplined and diligent;
- Have learning agility (curiosity and willingness to learn); and
- Display drive, purpose and initiative.

## **Recruitment process and closing dates**

Selected candidates will need to attend a series of competency-based interviews and a psychometric assessment.

## **Contact details**

Email: [careers@futuregrowth.co.za](mailto:careers@futuregrowth.co.za)