

## BUSINESS DEVELOPMENT ASSOCIATE

### PURPOSE:

To produce fund sales in excess of business plan, and to establish opportunities for the whole 7IM proposition including the 7IM Investment Management Service and the 7IM platform. This will be achieved through establishing and cultivating strong relationships with independent IFAs, as well as those who are members of nationals and networks. This will be done through direct contact and then driving the activity of the Business Development Manager (BDM).

### RESPONSIBILITIES:

- To produce fund sales in excess of business plan.
- To develop a strong and effective working relationship with your Business Development Manager.
- To establish and cultivate strong telephone based relationships with IFAs. This sales support will include regular proactive telephoning, email and postal contact with IFAs. Additionally there will be receipt of reactive calls. The purpose is to profile the IFAs, and then to direct the Business Development Managers (BDM) to those at the higher levels of potential sales, and then to maintain and develop the IFA relationships to drive ongoing and increasing sales and opportunities with them, working with the BDM who is based in the field.
- For those accounts which don't individually justify BDM involvement, the Business Development Associate (BDA) will lead and manage those accounts, which in total represent a significant contribution towards AUM inflows.
- The IFAs which will be targeted for profiling then selling will be independent IFAs, sourced from individual BDA initiative and activity (e.g. online searches, requesting referrals etc), incoming enquiries, exhibition and conference attendee lists, general marketing activity, and network, national and central organisation member lists and their MI regarding those with the right profile for 7IM's complete range of products and services.
- The role will involve clearly defined outgoing sales activity during substantial periods of the day, with a high outgoing call rate.
- To lead with the whole 7IM proposition including fund of funds, HNW investment management service and platform. To fully profile IFAs on that basis, to have initial profiling discussions on the relevant parts of the whole 7IM proposition, and then to call in support on the investment management service/platform opportunities subsequently. To work in a close and flexible team with all the Relationship Management (Investment Management Service) and Platform Relationship Management team members.
- To input into all marketing messages including literature, fact sheets, presentations and website.
- To collate and input competition's messages and our counters to them.
- To maintain the appropriate data on the CRM system, including practice profiling templates and account history records.
- To cross reference with other lead and relationship tracking systems such as Lynx.
- To input into business plans setting and review.
- To attend regular investment knowledge development meetings, including research meetings and fund manager presentations.
- To undertake continuous professional development, including the taking and passing of appropriate professional examinations.
- To adhere at all times to the Treating Customers Fairly policy as implemented by 7IM.
- To take on other tasks, projects and responsibilities as reasonably requested by the line manager.
- The role requires infrequent travel to the territory to support the BDM, and to those accounts lead by the BDA, as well as to all parts of the UK for attendance at exhibitions, seminars etc.
- Subscribe to 7IM's Mission and Tenets and to our Treating Customers Fairly (TCF) initiative.
- Other responsibilities as reasonably requested by your line manager or 7IM.
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For more information call 0207 760 8777 or visit [www.7im.co.uk](http://www.7im.co.uk)

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# JOB DESCRIPTION

## BUSINESS DEVELOPMENT SKILLS REQUIRED:

- Commercial awareness in order to build credibility with IFAs, to understand their situation, businesses and motivations, and to input into develop the content and format of effective marketing messages which are targeted to deliver the 7IM proposition appropriately in this competitive environment.
- Relationship building skills in order to rapidly establish a high level of trust with individuals, both in terms of personal competence and trustworthiness. Questioning and listening skills which are focused and empathic in order to fully understand the individuals' true understanding, views and feelings.
- Verbal skills in order to clearly and passionately communicate and persuade on the appropriate 7IM proposition and information to the intermediaries and advisors, combined with the patience to clearly explain the mechanics and processes of how the IFAs can place business with 7IM.
- Mental dexterity to respond appropriately, accurately and relevantly to questions, challenges and any misapprehensions from IFAs.
- Assertiveness and tenacity in order to address specific challenges and objections on the telephone and to close for commitment, action, and orders in a professional and effective manner.

## OTHER SKILLS:

- Planning and time management skills in order to most effectively allocate own time and maximise the efficiency of operation and service.
- Resilience in order to manage conflicting priorities and demands, ambiguity, high work load, rejection and other sources of pressure.
- Accuracy, thoroughness and attention to detail in order to maintain the highest levels of service to 7IM's intermediaries and advisors.
- Team working combined with individual initiative, creativity and self-sufficiency in order to remain effective in the face of rapid change and a lean and efficient management and resource structure.
- Personal development focus, taking responsibility for driving both personal and professional development in order to maximise effectiveness in this demanding role, and to grow with the role, and beyond.
- Written skills, in order to clearly, concisely and thoroughly present information to clients and advisors.
- Numeracy skills in order to understand, process and check a range of data
- Telephone answering, rapport and relationship building skills in order to rapidly establish a high level of trust with the clients and advisors, to manage expectations, and to demonstrate a high level of ownership, competence, reliability and responsiveness
- Flexibility and innovation to handle and support changing (and sometimes conflicting) needs and demands, and continually to improve working practices
- Personal development focus, taking responsibility (with the company) for driving forward both personal and professional development in order to maximise effectiveness in this demanding role, and to grow in the role, and beyond

## KNOWLEDGE:

- Knowledge of retail funds and the asset/investment management industry would be beneficial.

## QUALIFICATIONS:

- The ideal candidate needs to hold 5 GCSE's including Maths & English (Grade C or above) and ideally educated to degree level.

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- A good grounding in financial services, ideally qualified in IAQ / IOC with a desire to complete their IMC examination.

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