Candidate Specification

Business Development Manager

Contents

Basic role information

Position:	Business Development Manager
Based:	Office-based role with flexible working (1-2 days a week in the office) Offices in Newbury & London
Reports to:	Gary Wheeler, Chief Commercial Officer

The role

The role of Business Development Manager will be focused on growing our adviser business and extending the reach of our products and services to increase revenue and meet our ambitious growth targets.

The Business Development Manager will understand potential prospects' businesses and strategies to identify opportunities. In addition, they will possess an outstanding sales track record and a consultative sales approach and be comfortable dealing with senior individuals at a C Suite level.

Candidates need to be tenacious self-starters who have a clear process for identifying and qualifying leads and progressing them through a sales funnel to secure new business.

Our main clients are Adviser Firms and Networks, Asset Managers, DFMs, Pension Providers, Employee Benefit Consultants, Platform Providers and Banks/Building Societies, so a network of contacts in these areas would be beneficial.

At EV, we offer a breadth of software and investment solutions, from off-the-shelf financial planning tools, bespoke solutions via APIs, fund risk-rating services, strategic asset allocations and capital market assumptions, all powered by our market-proven stochastic EV Asset Model. This means the sales process can be complex, and the candidate will require a good understanding of IT and software solutions selling in a financial services environment.

Location

The role is office-based with 1-2 days a week in the office but will require travel. There are two offices in London and the Head Office in Newbury.

Key Responsibilities

- Structure, negotiate and close opportunities for the adviser business channel working on new business and existing client accounts within the business.

- Develop the sales strategy for the proposition within your territory with the CCO.

- Provide insights and share EV thought leadership on your proposition with prospects and customers.

- Possess a deep knowledge of the competition and know how sales strategies and tactics work in the marketplace.

- Strong prospecting skills and previous experience working with Marketing to create communication plans (emails templates, phone calls, etc.), conduct prospecting campaigns, and work with internal lead nurture and demand generation programs.

- Demonstrable closing ability to win sales campaigns, close late-stage deals, develop reasons for prospects and overcome late-stage deal obstacles.

- Evident opportunity management experience with managing pipelines, inspecting opportunities, accelerating campaigns, demonstrating deal ingenuity and providing deal-based ideas.

- Understanding of cost justification methodologies relevant to the business and the buyer, utilising a value case to differentiate a solution from competitive offerings, building multiple evaluation criteria compelling to the buyer, and developing business models that can be replicated and used by others.

- Identify new opportunities by understanding the client's business and requirements to ensure the highest level of service and maximise potential opportunities.

- Negotiate contracts and effective commercial models with the CCO.

- Primary contact point for new client stakeholders providing an effective migration plan into the account management channel.

- Work with the existing sales team to identify cross-sell opportunities and manage the pipeline/activity in Hubspot.

- Responsible for onboarding new services for new accounts.

- Develop long-term relationships with this portfolio of clients, connecting with key business executives and stakeholders.
- Maintaining regular contact with industry figures and establishing networks of lead generators.
- Providing feedback to internal proposition teams to ensure customer needs are met.
- Creating and maintaining ‘Growth Plans’ in conjunction with the Senior Account Manager and establishing new routes to market.
- Identifying new target markets and product developments to aid new sales.
- Fully understand our proposition and be able to demo/discuss products/ services in detail and work with Propositions to stay up to date.
- Communicate the progress of monthly/quarterly objectives to CCO.
- Forecast and track key account metrics in Hubspot.
- Maintain and develop industry and product knowledge by participating in internal/external training programs.
- Maintaining positive industry networks via LinkedIn and other social media.
- Attend and represent the company at marketing, conferences and Industry events

Required Knowledge and Experience

- Proven business development experience in a related financial services sector
- Strong knowledge of the Adviser Market and Networks
- Ability to understand and interpret client solutions in a clear and commercial manner
- Effective Communications / Stakeholder management skills. Presenting and influencing credibly and effectively at all levels of the organisation, including executive and C-suite levels.
- Presenting client solutions in a commercial manner. Managing internal stakeholders.

- Excellent active listening, negotiation and presentation skills. Excellent verbal and written communication skills.
- Professional curiosity, proactive and resourceful.
- Experience in delivering client-focused solutions based on customer needs.
- Self-motivated and able to thrive in a results-driven environment.
- Natural relationship builder.
- Critical thinking and problem-solving skills.
- Keen attention to detail and adherence to deadlines.
- Team Player with the ability to adapt / “can do” attitude.
- Client-focused.

Desirable Experience

- Life & Pension Providers, Asset Managers, Platforms, and Large Advisory Groups.
- Proficient in Microsoft Office Suite
- Hubspot or other CRM

The benefits of joining our exciting team

As well as offering fantastic opportunities for career progression once established in your role, you will be joining a friendly and relaxed working environment where you will be continuously supported and encouraged to reach your full potential. We have an open culture that enables you to find and fix problems and not pass them on to another team. We are a great environment for makers and builders.

Sound like you?

We have fantastic benefits, including

- 25 days annual leave, bank holidays, one extra ‘company day’ for Christmas, plus the option to buy a further five days annual leave
- Generous company pension scheme – 5% employer contribution
- Commission plan
- Private medical
- Fully qualified Mental Health First Aiders
- Long term disability and Life Insurance
- Study support policy
- Free parking
- A huge range of free hot and cold drinks
- Excellent fully funded company events
- Company football team and Table Tennis team
- Poker nights with pizza!
- The opportunity to support local charities

A little bit about us

At EV, we have operated as an independent organisation for over a decade, backed by a further 18 years of financial services consultative experience. We connect and empower our intermediary financial partners with intuitive, customer-centric advice and guidance software and investment solutions.

Powered by our proprietary market-leading stochastic asset model, our powerful calculations and strategic multi-asset allocations are used globally across the financial ecosystem by financial advisers, pension and platform providers, asset managers, banks, and building societies, to name but a few.

We have over 80 talented specialists working across offices in Newbury and London. We passionately believe our greatest assets are our talent and pride ourselves on attracting, developing, and engaging the best talent.

Every day, we bring collaboration, creativity, innovation, and passion that delivers better financial outcomes to all. We're a fast-paced, growing fintech that connects and empowers our clients with intuitive, customer-centric advice and guidance software and investment solutions.

And we're on the hunt for talented individuals that are forward-thinking, driven, and ready to make a real difference. Ready to write your next chapter with us? Then become part of the EV story.

We are EV. Join us today

Useful information

Celebrating ten years in the EV journey: the events that shaped the Financial Services industry

EV Investment Solutions: When the going gets tough, the tough get going

EVPro: Game-changing holistic financial planning software for advisers

EV listed in WealthTech100 for the fourth consecutive year

Retirement Financial Planning: What will 2022 look like for guided consumer journeys?