

Position Description

TITLE	CRM Customer Relationship Manager - Frankfurt
REPORTS TO	Head of Country Germany
LOCATION	Frankfurt

Summary

The objective of this position is to assist in enhancing and further developing the German & Austrian distribution network. This is done by working as a team with the Head of Country and the local team and by helping to service and develop mutually beneficial relationships with the distribution community, covering all aspects of superior service and support. Over the last years thanks to our growing business within the fund buyer community the administration part and data & reporting became a growing task.

Responsibilities

Team Support

- ▶ Work with the Head of Country and the local Business Development team to plan work schedule
- ▶ Work closely with CRM and share some key tasks ie data & reporting
- ▶ Focus is on distribution support.
- ▶ Ability to transform product presentations to fund buyer german ppt
- ▶ Role should have a clear client focus, internal development into business development role seen as next career step.
- ▶ Handle incoming calls and act as an entry point for questions from the German & Austrian distribution network
- ▶ Supporting the local team in the diversity of their needs
- ▶ Being a pro-active and idea generating partner within the local team
- ▶ Follow-up of internal and external requests
- ▶ Quality control and set-up of presentations and other documentation for the business development team, ready to sell
- ▶ Generate monthly/quarterly and ad hoc reports for HoC, local team and Management
- ▶ Prepare topics for the weekly team meeting to keep all team members informed about recent developments and initiatives relating to client servicing and related CRM subjects
- ▶ Update the contact management tool with up-to-date contact information, conversation, activity and meeting notes to allow follow-up action
- ▶ Research for meeting preparation
- ▶ General data management and clean-up

Distribution Network Service

- ▶ Demonstrating superior client service skills for all daily tasks
- ▶ Ensure expedient and accurate resolution of all incoming requests by distribution network
- ▶ Building up strong service relationships with distribution network
- ▶ Arrange for completion of all incoming requests for information (due diligence, questionnaires) from the distribution network, platforms and research companies with respective departments (RFP/RFI)
- ▶ Coordinate the sending of ad hoc and regular reports to the distributors
- ▶ Provide service support by using marketing material, fund information and updates
- ▶ Promotion of the company web site and services to the distribution network and work with internal departments on respective initiatives
- ▶ Ensure follow-through and continuous communication between the company and the investment community
- ▶ Event, fairs and meeting participation
- ▶ Provide continual feedback to Management on market conditions, distribution network requests, product requests, competitor information and operational or other issues
- ▶ Propose ideas and suggestions for enhancements on process and tools to provide best in class client service
- ▶ Interface between various departments such as Marketing, Product, Event, Web, Communication, Legal, Middle Office, Reporting, Accounting, Change Management on issues as they relate to these departments
- ▶ Understanding of operational procedure and guidelines and close cooperation with Middle Office team on respective questions
- ▶ Handle requests for code agreements and any other Middle Office related matters (in particular local specifics)
- ▶ Liaison between Legal / Tax department and distribution partners for requests, amendments, distribution of information, new regulations and campaigns (in particular local specifics) and maintenance of the distribution partner agreement list
- ▶

Marketing & Event Support

- ▶ Smooth and high quality handling of the translation process into the local language in cooperation with existing CRM
- ▶ Review and proof reading of all marketing, product, press and reporting material into local language

Candidate Profile

- ▶ This position requires excellent interpersonal, communication and organizational skills
- ▶ Highly motivated and dynamic personality, high "service" attitude
- ▶ Not being busy-but doing the relevant tasks
- ▶ Good knowledge of regulatory framework Germany, data providers & requirements
- ▶ Must be a team player and work well with corresponding local team and members of the wider organization
- ▶ Client Service minded and striving for support excellence
- ▶ A supportive, persuasive telephone manner with clients

- ▶ Courteous, open-minded, pro-active and reliable
- ▶ Professional demeanor in the office and when representing the company during public events
- ▶ Adequate handling of confidential information
- ▶ Ability to handle a wide range of questions and projects with minimal direction and meeting deadlines
- ▶ Good eye for detail, diligent and structured
- ▶ Computer proficiency
- ▶ Must be bilingual in English and German, French would be a plus
- ▶ Good knowledge of investment management, investment products and financial markets
- ▶ Previous investment fund and/or asset management and client service experience required
- ▶ Graduate/post-graduate degree in a business related discipline

⇒ **To apply to this job, please send your application to the following address:**
irecruitment@carmignac.com