



# Integration Consultant

## Job Description

### **About Benchmark Capital**

Benchmark Capital powers financial advisers through insight and integrated tools, services and investment solutions that help them differentiate their client proposition.

Helping advisers to look after their clients is at the centre of everything we do. Our award-winning solutions support over 150 advice firms, with £17.1 billion of assets under advice<sup>1</sup>

With a technology-led ecosystem of regulatory, platform, and investment services, and our own financial planning business, our approach is guided by delivering safety and security for customers and focused on positive client outcomes.

We believe that first-class client service and integrated technology are essential components for long-term success. Our seamless, holistic approach works in harmony both to empower advisers and their clients and to generate tangible financial and competitive advantages.

We work with some of the most successful financial planning firms in the UK, bringing the power of technology to advice and wealth management

<sup>1</sup>As at 31.03.21

### **The base**

You'll be based at our Broadlands Business Campus near Horsham in West Sussex. It has high standards and international reputation, without being in the city: a big, countryside campus means life will feel a little different.

We support our offices by using cutting edge software and hardware and our spacious campus facilities mean there's a great working environment for the team. With an on-site restaurant, coffee shop and gym, our campus has much to offer. And commuters can relax on our dedicated regular shuttle bus to and from Horsham's main line train station.

We know that helping you balance personal and professional commitments is a big part of that, so we're open to flexible working. Many of our staff work flexibly in many different ways, including part-time. Please talk to us at interview about the flexibility you need.

### **Overall Purpose of the Job:**

Benchmark has to date completed over 25 acquisitions over the last few years and has agreed to further accelerate our activity. This will require further support for integrating the acquired business effectively. The Integration Consultant works for the Head of Integration and will take ownership of the integration activity for a number of our acquired businesses. This will include due diligence, support, planning against the integration framework, support in negotiating integration and purchase agreements, managing against the agreed plan, stakeholder management and delivering against agreed acquisition outcomes.

The role holder is the principal day-to-day point of contact for all things related to integration for their firms, and responsible for managing the overall integration process design, mechanics, and protocols to be followed by all functions. The Integration Consultant works across line functions to establish Integration roadmaps based on current and forecasted business requirements and need. The Integration Consultant personally drives the change by being directly and principally involved in the subject matter of major issues so that this role helps manage the 'white space' and dependencies by identifying issues, and then coordinating and communicating resolutions to all involved.

The Integration Consultant must be skilled in all the organisational functions. A typical M&A integration will involve designing new organisation structures, modifying cultures, moving premises, integrating systems, overhauling operations, consolidating products and services to name a few. The Integration Consultant may not be directly involved in the detailed integration of processes, systems, and people, but they must know the subject matter well. The individual should be experienced in M&A integration, ideally in the wealth and financial adviser sector, and should be comfortable in managing a volume of complex acquisitions in parallel.

### **What You'll Do**

- Responsible for the integration activity for a number of firms in the process of being acquired by Benchmark
- Support the undertaking of due diligence and purchase agreement negotiation to incorporate appropriate integration plan
- Plan and conduct Integration kick off meetings so that all functional leads understand their roles and responsibilities during the transition period
- Manage the interdependencies between functions so activities are prioritised and sequenced accordingly
- An integration progress tracking and reporting process, for all functional integration leads to follow
- Bring together two organisations to ensure alignment and the protection of key assets
- Act as consultant, facilitator, communicator, and project manager
- Evaluate the risks associated with an integration and mitigate them to the most reasonable extent possible

- Drive benefits realisation, synergies, and alignment to ensure Benchmark gets appropriate outcome

### **The Knowledge, Experience And Qualifications You Need**

- Experience of undertaking mergers and acquisitions integration activity covering pre and post deal
- Experienced in successful integration project management; ability to handle projects with multiple workstreams and stakeholders
- Experience in the wealth management and adviser market highly desirable
- Strong influencing, written and oral communication skills
- Naturally curious, highly motivated, self-starter
- Rapid problem-solving skills
- Ability to communicate effectively, with strong interpersonal skills and emotional intelligence
- A team-oriented and collaborative approach to work
- Ability to understand the big picture, with an eye for detail
- Organisational knowledge, motivational skills, and ability to quickly prioritise
- A background in finance and understanding of the business and functional areas can be extremely helpful
- This role will require travel in the UK and to work onsite with partner firms as required

### **The Knowledge, Experience And Qualifications That Will Help**

- Graduate level degree
- Solid experience in M&A integration
- A background in Finance and understanding of the business functional areas can be extremely helpful
- Ability to think strategically

### **What You'll Be Like**

- Integrity
- Resilient

### **We're Looking For The Best, Whoever They Are**

Benchmark Capital is an equal opportunities employer. You're welcome here whatever your socio-economic background, race, sex, gender identity, sexual orientation, religious belief, age or disability.