FusionWealth

Head of Relationship Management

Job Description

Reporting To:	Managing Director
Responsibility for Others:	Line management for Relationship Management team
Location:	Horsham but must be able to travel to client sites – nationally and if needed, internationally
Hours of Work	Monday to Friday 9.00am to 5.30pm with 1 hour for lunch
Any Special Requirements	N/A

Overall Purpose of the Role:

Fusion Wealth has grown substantially over the past few years and this role and team reflect the importance of the relationships between Fusion and Third-Party Providers on behalf of our customers.

This role is responsible for continuously improving business relationships with Providers and where appropriate, clients. The goal of the area is to facilitate excellent relationships so that Fusion, Benchmark, its partner firms and our end-customers maximise the value of these relationships and maintain a good reputation.

The Head of Relationship Management is a senior role, driven by a desire to provide a great experience to all firms and end-customers who engage with us, regardless of which combination of our services are consumed.

The Head of Relationship Management is driven to ensure Fusion continuously improves its relationships with partners. Part of this role will see idea generation discussed between Fusion and Third Party Providers to ensure the product offering remains at the forefront in the industry – whether through product development, steam-lining processes and/or improving straight through processing.

There is a strong focus on using data to look for trends and problems, and analyse communications, contracts and negotiations. The insights are used to refine company practices.

Leading by example the HoRM has strong communication and coordination skills which are necessary for facilitating excellent relationships with clients and other partners.

In addition to communication skills, the HoRM (and all relationship managers) need strong analytical skills to develop a deep understanding of the products and services being sold, the markets in which they are being sold, and broader industry trends. The better they understand the technical aspects of the business, the clearer and more efficient they can be communicating with customers / partners or helping staff meet the needs of customers or partners.

Key Activities & Responsibilities:

– Overall responsibility for the management of the Fusion Relationship Management department

- Overall responsibility for cultivating excellent relationships with Third-Party Providers
- Contribute to the growth of Fusion Wealth working with the senior team / directors to anticipate future demand / priorities
- Lead and manage the relationship management department in order to:
  - Ensure Service Level Agreements are in place and MI tracked and reported monthly
  - Ongoing monitoring of performance and managing poor or inadequate performance of providers
  - Create and enforce plans that will help meet the needs of customers
  - Build long-term relationships with partners, providers and customers
  - Work quickly to address and resolve partner / provider / customer issues
  - Notify the sales team of new sales and cross-selling opportunities
  - Become familiar with the competition to stay ahead of them
  - Encourage good customer service practices
  - Help promote and maintain a positive company image
- Lead competitor analysis and research to ensure knowledge based decision making in the Relationship arena
- Deliver financial results in line with agreed budgets, revenue and profit targets
- Support thinking and direction setting on new product need, identification of potential partnerships and process development
- Promote brand and solution to ensure industry awareness and maximise sales leads/conversions through Industry Events and Networking

Required Skills/Experience:

- 5+ years' experience in managing key/strategic relationships
- Ability to engage with business owners and decision makers, experience with 'C' level engagement
- Ability to lead and motivate
- Excellent communication and relationship building skills, with the ability to communicate effectively at all levels.
- Team player who can gain the support, confidence and commitment of internal and external stakeholders
- Proven experience of presenting, influencing and negotiating with clients and colleagues at senior level
- Excellent organisational skills
- Graduate level degree
- A high level of general investment knowledge is required

Desired Skills / Experience

- Understanding of the project life-cycle and the disciplines associated with running multiple, complex projects
- A high level of knowledge of product providers, DFMs, wealth managers and financial planning businesses is desired
- Experience of IT CRM systems and processes