



Partnership Director

Job Description

Who We're Looking For

Reporting to the Head of Partnership Management, this new role is a key part of the Wealth function, paying a critical role in managing, developing and growing the commercial relationships across a number of our key adviser relationships across Benchmark Capital. The role works closely with the business development, service management, compliance, proposition and marketing teams, and takes accountability for the overall relationships of a number of adviser partnerships (between 30-50 firms), with the aim of improving commercial performance by enabling these firms to grow, develop and deepen their relationship with Benchmark Capital.

The role will ensure that opportunities are identified, and prioritised, annual account plans developed and delivered, and that year on year revenue growth is achieved aligning to our near and long term targets. It will also ensure that priorities, feedback and issues are appropriately prioritised and managed, through the service management teams, acting as the escalation point. The role supports the delivery of our partnership programme for our advisers and brings together the single view of the relationships they are accountable for, ensuring high degrees of satisfaction and retention.

The role requires strong commercial and relationship skills, with proven experience in building and developing deeper, highly differentiated and more valuable partnerships. As well as excellent organisational skills, be comfortable in sales, client presentations, negotiation, issues resolution and bringing together different parts of the organisation to align with our adviser's priorities.

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 advice¹

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

¹As 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.

What You'll Do

- Accountable for the commercial relationship with their assigned adviser relationship – and provides overall ownership and key escalation point across all relationship contacts
- Implements the partnership proposition and programme across all their relationships
- Brings together business development, compliance, service management and supporting services to provide a unified service and relationship hub for each partner
- Drives improved revenue position through cross-selling and upselling and maximise retention of relationships
- Manages against an annual new business target for their associated firms and coordinates the activity that puts in place the plans and resources to achieve this, with a focus on revenue growth from the existing pool of relationships
- Actively seeks to identify and prioritises the needs of their adviser partners, understand their business plans, goals and satisfaction ensuring, these are represented within our overall plans and roadmaps
- Implement commercial contracts and implement new contractual terms within the existing partner firms
- Define and agree account plans, identifying key growth opportunities and support needs
- Ensure that the single adviser view is built, maintained and that insight can be accurately gathered. Ensure that all touch points within the end to end relationship model is effectively implemented
- Build and maintain virtual relationship and service hubs that align the key resources for how most valuable, and fastest growing relationships
- Provide regular reporting into the partnership and broader wealth functions

The Knowledge, Experience and Qualifications You Need

- Experience in managing complex commercial relationships, either within a business development, sales, relationship or partnership role
- Proven track record of achieving sales and revenue growth from existing relationships
- Strong commercial skills covering negotiation, prioritisation and issue resolution
- Good knowledge of the financial advice market, with experience of commercial relationships with financial

advisers and wealth managers a strong preference

- Proven at working across multi-disciplined teams bringing together compliance, service and technology leads for a given relationship
- Great command of MS Office and CRM, especially Salesforce would be beneficial
- Good problem-solving skills
- Team player with excellent leadership skills
- Good time-management skills
- Great interpersonal and communication skills

What You'll Be Like

- An experienced and commercially aware relationship manager, with specific knowledge of financial advisers (and ideally our firms)
- Exceptional interpersonal skills, with the ability to build deep, trusted relationships, and strong respect and rapport with our partners
- High commercial focus, with the ability to prioritise across a diverse range of priorities to ensure that we are aligned to those areas of greatest commercial value
- Collaboration: build respect with the key teams who are supporting the relationships, gaining the respect more through demonstrating a cooperative and knowledgeable approach rather than relying purely on the “influence of office”
- Business knowledge: be able to navigate the internal organisation to get action and/or information on initiatives which are a priority for the financial advice business
- Delivery: work within a high paced environment to continually prioritise and ensure delivery of outputs on time and to high quality. Ability to work at different levels of detail and be able to concisely summarise complex issues
- Business Awareness: clear understanding of the business strategy, objectives and priorities, as well as the systems organisation and infrastructure
- Communication: excellent communication skills and ability to influence, drive and motivate agendas and teams outside direct reporting lines
- Focus: analytical, logical and methodical. Strong numerical skills possibly gained in a finance or strategy environment. Excellent planning, prioritisation, problem solving and organisational skills. Experience of balancing multiple tasks and playing different roles depending upon the scope of the issues. Ability to work alone or as part of a team

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.

Important Information: Issued by Benchmark Capital Limited, Broadlands Business Campus, Langhurstwood Road, Horsham, West Sussex, RH12 4QP. Registration in England No 09404621.