



Market & Customer Intelligence Manager

Job Description

Who We're Looking For

A Market & Customer Intelligence Manager to proactively identify qualified leads for our business development and marketing team by leveraging internal and external data sources, and ensuring we manage our processes effectively. You will need proven data analytics capabilities and be able to build and manage our sales and market intelligence to support our sales and marketing efforts.

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 1600 advisers with £17.5 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 31.06.21

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

- Develop our intelligence on our existing customers, prospects and target markets
- Champion our "one CRM" strategy
- Bring an understanding of sales pipeline, opportunity management, and research skills to support business development
- Proactively identify qualified leads against our target segments
- Support the management and optimisation of our pipeline, and develop strategies to support acquisition, conversion, retention and loyalty across our adviser partners.
- Plan, design, build, and publish data and deliverables with clearly articulated insights to agreed timescales and frequency
- Provide subject matter expertise to support the successful implementation and adoption and of Salesforce CRM
- Own the development prioritisation process for CRM configuration
- Ensure data integrity is pro-actively managed by all relevant data owners and maintaining best practice
- Support data owners with user training
- Deliver accurate and reliable reporting and analytics insights in a timely manner
- Deliver complex analytics in a meaningful way to meet the needs and style of the audience

The Knowledge, Experience and Qualifications You Need

- Experience working as a CRM analyst, CRM marketing manager, data analyst or sales/marketing support lead within the finance industry
- Experience in driving sales planning and qualified lead generation within a B2B environment
- Understanding of wealth/IFA data sources with B2B sales and marketing experience
- Deep understanding of CRM, sales process, and marketing automation, specifically Salesforce
- Salesforce certification preferred, with practical experience of marketing integration
- Stakeholder engagement, management, and collaboration with ability to question and challenge, put forward new ideas and gain buy in through key working relationships
- High level proficiency in Excel and other data tools
- Strong analytical skills and data literacy
- Credible and effective communication skills

What You'll Be Like

- Highly analytical, logical, and curious
- Self-starter who is passionate about uncovering insights and conclusions from data
- A collaborative problem solver
- Ability to use intuition to research solutions
- Enjoy manipulating data and surfacing valuable insights
- Well organised with strong time management skills
- Methodical in approach

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.