



Position Description

Relationship Manager

Job Summary:

This is a great opportunity at a successful Financial Services start up which would enable you to make your mark on the long-term success of the firm, as well as gain experience in multiple business disciplines.

The position blends the unique experiences of client interaction, business development and analytical market research. As a key member of this growing team you will be expected to develop business-critical client relationships, lead the training process for new and potential clients as well as provide unparalleled customer service and user support. Furthermore, this role will require you to assist in the strategic assessment of the product, industry trends, and the competitive landscape as it pertains to the firm

Account Management Skills:

- Ability to be viewed as a critical “trusted advisor”, partner and solutions provider for existing clients and communicate successfully across the organization. Moreover, your work should be seen as a valued resource internally and externally.
- Ability to cultivate, maintain, and develop existing and emerging business-critical client relationships
- Participate in cross-account, functional, and business development activities to provide the account’s input, communicate to the company about the account, and ensure the account team effectively adds to/uses best practices.
- Maintain contact with clients and manage accounts to provide ongoing support and training both on the phone and travel throughout North America.
- Identify and develop potential new services, or enhancements to existing services, that will benefit clients and drive incremental revenue
- Understand client’s specific goals for value and ROI, and communicate to delivery and support teams, monitor progress toward those goals, and initiate actions to better deliver value.
- Understand the equity capital market conditions, dynamics, and undercurrents
- Identify client trends and recommending solutions to recurring problems and issues
- Must possess excellent interpersonal, communication, and presentation skills

Client Servicing Skills:

- Implement various instructional methodologies to improve existing training programs
- Conduct market research to understand competitive landscape and industry trends for new/enhanced services
- Communicating professionally and constructively to effectively resolve issues
- Provide training to existing and prospective clients on all new/enhanced services.
- Design, develop, and update training documentation to meet departmental training needs
- Recommending workflow improvements
- Ensure inquiries are resolved timely and accurately
- Possess an aptitude for thorough and timely research, analysis and resolution of a problem
- Goal-oriented, self-motivated, team player
- Strong organizational skills and detail-oriented



Qualifications:

Education:

- College Degree (B.S. in Business a plus)

Experience:

- One year experience on an equity trading desk
- Proven track record of success in cultivating, maintaining and servicing key client relationships a plus.
- Working knowledge of Internet, Excel, Word, Outlook, etc.
- Ability to learn new computer applications quickly
- Basic understanding of the financial markets preferred

Contact:

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