

## Sales Analyst, Commonfund Business Development Group

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### POSITION DESCRIPTION

Commonfund seeks to hire a Sales Analyst that will be a key member of the Business Develop group providing support to the firm's Outsourced Chief Investment Officer (OCIO) sales capabilities. The Analyst will be involved in all facets of the sales process including assisting with the identification of business prospects, helping to advance opportunities, and helping to close business. The Analyst will assist the team by searching industry media and publications reports; developing marketing projects; organizing research and materials for RFP and/or finals presentations among other responsibilities. The Analyst will promote efficient and effective processes through a clear understanding of the systems available to the group. The Analyst will support the sales activities to prospects which include, endowments, foundations and other non-profits having investable assets of more than \$50 million.

This role focuses on institutional organizations throughout North America with most of the contact taking place via telephone, social media, online meetings, and local/on-site meetings. This Analyst will act as the primary liaison between Commonfund's sales/service team and internal and external clients and prospects to enhance our visibility and ensure high quality standards are maintained. Possessing a solid understanding of a professional investment environment, the successful candidate must be task and detail-oriented with outstanding interpersonal skills to effectively manage the aspects of the Business Development Group.

### PRIMARY RESPONSIBILITIES:

- Support sales efforts converting qualified prospects:
- Coordinate internal meeting resources (i.e., investment & risk management teams) with clients/ prospects
- Conduct comprehensive pre-meeting research
- Compile and produce meeting materials/research/pitchbooks
- Communicate with marketing, sales/service, and investment personnel to ensure adequate briefing on new business opportunities
- Coordinate follow-up requests and action items from client and prospect meetings
- Ensure client communications and materials adhere to Commonfund compliance policies and procedures
- Support organization and enterprise initiatives related to sales and marketing functions:

- Network at industry conferences and Commonfund sponsored events, where appropriate, to strengthen current relationships and develop connections with prospects
- Work closely with Marketing to coordinate sales events
- Assist in the preparation and execution of territory sales plans
- Respond to ad-hoc requests and projects as needed
- Support potential accounts for prospect identification, lead qualification and opportunity development:
- Research prospect institutions with primary focus on trustees, investment staff, and other decision makers (e.g., OCIO consultants)
- Generate and qualify leads through calling effort; establish “know your client” information; and, post to CRM system for Compliance approval. Manage pipeline activity and campaign events/marketing materials
- Record all activities and opportunities within CRM system for use in ongoing territory analysis, marketing efforts and ad-hoc campaigns

**PREFERRED BACKGROUND:**

- Four-year degree is required
- This position is open to recent graduates and individuals with up to 2 years’ experience in institutional or wealth management
- Must be a self-starter and demonstrate a passion for sales; strong understanding of financial marketplace; entrepreneurial, detailed, dynamic, and highly motivated
- Ability to manage time effectively, multi-task and work well under pressure in a team environment
- Excellent organizational, phone, writing and verbal communication skills
- Mastery of verbal and digital presentation capabilities
- Strong interpersonal skills and ability to communicate effectively with individuals at all levels of a client or prospect organization
- Proficient use of Microsoft Word, Excel, and PowerPoint

**This is two-year position which will allow the analyst to gain a full understanding of the Institutional Sales process.**

**This position is based in either our New York City or Wilton, CT office.**

**Interested candidates should email a resume and cover letter to [careers@commonfund.org](mailto:careers@commonfund.org)**