Expand
A BCG Company

Job Description – Client Engagement Lead, Asset & Wealth Management

About us

Expand Research celebrated its 20th anniversary in 2021 and has been a wholly-owned subsidiary of BCG for 10 years. Expand provides peer benchmarking and research to the world's leading financial institutions – across banking, capital markets, and asset & wealth management segments. Our capabilities focus heavily on measuring firms' performance from a technology, operations, and human capital perspective looking at investment and outcome metrics and KPIs. Clients use our research and syndicated benchmarks to inform product and strategic roadmaps, investment decisions, staffing and product strategy, and facilitate their budgeting process. The Expand team services clients out of London, New York, and Singapore.

Our enthusiastic and committed team has a friendly, diverse small company feel with regular social events (including virtual ones!) and a highly collaborative, professional, supportive and entrepreneurial working culture.

Job description

Expand is seeking a candidate based in either New York or London to join our Asset & Wealth Management (AWM) practice area business development team to support client activity in the Americas. The Client Engagement Lead will operate on the front end of the sales process, building pipeline and identifying targets. A successful candidate will possess the "hunter" mentality as they will be actively prospecting and driving business.

Sales responsibilities:

- Driving the regional sales cycle from assessing target segments, prospecting, building pipeline, through to deal closure
- Development of quarterly sales plans and customizing sales collateral and proposals
- Assisting the regional sales team with contract renewals and client engagement
- Coordinating industry roundtable logistics and driving regional client attendance

Collaboration responsibilities:

- Collaborate with Expand and BCG colleagues to service client benchmarking needs
- Collaborate with Marketing resources re: best positioning and promotion opportunities for practice area/segment
- Provide feedback to Sales Management, local SME/Partner, and Expand Delivery team based in UK regarding the service offerings and how they meet/match client needs

You will work day-to-day with the Director of Business Development for the AWM Americas region and will report up into the US regional Partner's team. In addition, you will have daily interaction with the AWM practice area based in London and support clients across the US, Canada, and South America.

Job requirements

- 3-5 years of experience in sales or business development role(s), at least two of which involve selling to the asset management, wealth, or pension segments
- Working knowledge of information and research products and selling tactics
- Entrepreneurial mind-set with an interest in and aptitude for understanding key industry and technology trends and client needs, and driving solutions
- Demonstrable track record of meeting and exceeding goals
- Excellent verbal communication skills
- Meticulous attention to detail
- MS Office skills (Excel, PowerPoint, Word, Outlook)
- Salesforce familiarity a plus
- Bachelor's Degree
- Limited domestic US travel may be required; infrequent international travel

Apply now

Please email your CV to careers@expandresearch.com quoting reference USCELWS.

Please also include your desired salary and confirmation that you are permitted to work in the US/UK, along with your notice period/available start date.

By submitting your personal information, which could include a job application, you give Expand and BCG permission to process, screen and store it for the purposes of the recruitment process. We may share this personal information with a third party IT provider which hosts our recruitment platform and with third party assessment providers who assesses your qualifications as part of the recruitment process. Your personal information will not be shared with any other parties except as set out herein. For additional information, please review our privacy policy which we will update from time to time. You give Expand and BCG permission to retain your application and contact details to verify whether you have previously applied and so that we may notify you of further opportunities.

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