

January 2023

Role: Client Services and RFP Analyst
Functional Area: Sales and Marketing
Office: London
Reporting to: Head of Client Services
Contract: Permanent

A great opportunity has arisen for an RFP writer to join an entrepreneurial, established, and successful asset manager with a strong market reputation and track record run by unassuming high-calibre professionals with ambition and an appetite for growth. We have offices in London, Hong Kong, New York, and Japan.

TT strives to hire excellent individuals no matter who they are or how they got there. We are an equal opportunities employer welcoming people regardless of their sex, marital status, ethnic origin, sexual orientation, religious belief, or age. We recognise the benefits of neurodiversity and encourage anyone with the skills and experience required to apply. We offer hybrid working and endorse flexibility.

RFP Analyst Job overview

The Sales & Marketing team at TT is a busy team with 8 people based in London, 2 in New York, 2 in Hong Kong and 1 in Japan. This role is an integral part of the firm's growth plans and will enable you to be involved in the process of retaining and adding to the firm's client base, whilst at the same time increasing your own knowledge and capabilities across the investment management industry.

You will assist the company in raising assets by developing, maintaining and distributing clear, accurate, consistent and persuasive firm and product information for use in formal business proposals.

Your primary responsibility will be the completion of requests for proposals (RFPs) for TT's existing and prospective clients globally and you will also be responsible for maintaining product and firm information in the RFP database (Qvidian). An additional component of the role includes producing high quality and accurate data for RFPs and other client/prospect requests, along with maintaining external consultant databases. You may also be asked to provide client services/marketing support to the sales team and their clients.

Role and responsibilities

RFP production

- Primary responsibility for RFP/DDQ production including new business RFPs, on-going regular client DDQs and ad-hoc DDQs. Includes all TT's asset classes and an increasing number of ESG related questionnaires.
- Ensure that answers in RFPs are accurate and present the investment case for TT in the best light at all times. Ensure that the competitive advantages of the company and our products come across strongly in RFPs.
- Maintain qualitative entries for external consultant databases (eVestment etc).
- Primary responsibility for the maintenance and on-going enhancement of the RFP database of responses (Qvidian).

- Keep abreast of changes within the firm, products and industry, ensuring changes are reflected in RFPs and the RFP database. Ensure new information flows through to the sales and marketing team effectively.
- Demonstrate strong writing ability and product knowledge to draft any new content required.

Data production

- Produce high quality quantitative data such as portfolio performance, holdings, characteristics and AuM for DDQs, RFPs and ad hoc requests for new business and existing clients.
- Assist with quantitative entries for consultant databases (eVestment etc)

Client service support

- Work within the sales/marketing team on the updating and production of marketing materials for existing and potential clients across the firm's product line-up.
- Provide ad client service support and assistance to Head of Client Service and Relationship Managers as required.

Qualifications and skills

This role requires a proactive, organised and diligent person regardless of degree background. You need to be able to work with a wide range of employees across the firm, including senior investment and sales professionals, to present our investment capabilities in the best light and assist in winning new business for the firm.

Key skills and experience include:

- Excellent written and oral communication skills are essential.
- Deadline driven - organised, precise and methodical, ensuring that relevant details are not overlooked.
- Interest in global economics and finance is a bonus.
- Approximately 1-3 years within the Asset Management Industry.
- Education to a degree level or qualified by experience with excellent writing skills.