



Neighborhood Trust Financial Partners
Business Development Associate
New York, NY
March 21, 2017

Who We Are:

Neighborhood Trust's mission is to empower low-income individuals to become productive participants in the U.S. financial system and achieve their financial goals. Neighborhood Trust serves over 6,000 clients each year via its elite corps of Financial Advisors and is an industry leader in the financial inclusion field. We are cultivating our model as a scalable social venture that incubates technology-led financial services innovations for low income households. We are growing quickly with strong support from leading foundations and strategic partnerships helping us achieve national scale. In 2015, our WageGoal product was a winner of JP Morgan Chase's Financial Solutions Lab challenge.

Summary

Neighborhood Trust Financial Partners seeks an Associate to join our Business Development team. The Associate will report to the Director of Sales and Client Management. He / she will support the continued growth of our developing Employer Solution business, a new social business venture of Neighborhood Trust Financial Partners. For more on Employer Solution, visit theemployersolution.com

Responsibilities

Organizational:

- Research potential customer leads and provide initial recommendations for lead movement
- Draft customer reports for existing customers highlighting NTFP program performance, impact and opportunities by using data, analysis and visuals
- Design, develop, implement and analyze client and customer surveys
- Spearhead data gathering and collection to support the measurement of the program's success for employers, and utilize analytics to inform engagement strategies, marketing, sales, and positioning
- Manage the Business Development team's Salesforce CRM and data needs, and work with NTFP's data and IT teams to develop new functionality as necessary
- Conduct research to assist in a variety of efforts related to sales, including; sales prospects, industry trends, and the financial wellness sector
- Partner on marketing and engagement strategies to help meet annual goals
- Update systems and processes to streamline workflows and communications of program
- Manage tech / equipment inventory for Business Development's team of financial counselors
- Process Business Development expense reporting
- Provide support to other business development programs as required

Customer & Client Facing:

- Work with the Relationship Manager and the Programs Department to coordinate and implement evolving service delivery and client engagement strategies, ensuring we serve at least 2,000 clients in 2017 and 2,500 in 2018.
- Attend, host and/or present at customer benefit fairs, employee events or meetings to promote service and deliver materials, banners etc for onsite events.
- Support in successful launch of new customers, or new product launches with existing customers

- Successfully oversee and improved efficiency of logistics
- Confidently conduct presentation of Neighborhood Trust offerings to workers and achieve high engagement conversion
- Assist with onboarding and service delivery for clients including online registration and other client registration channels.
- Provide on-demand client and employer support to NTFP counselors and team

Required skills and experience:

- Detailed individual with the ability and bandwidth to juggle a variety of assignments
- Efficient research, synthesis and analysis of internal and external data with strong narrative and data visualization product deliverable
- Eagerness and interest in creating more efficient process and systems for service engagement and delivery
- Commitment to customer and client first approach and learning about product development in a fast-paced and nimble environment
- Strong communicator that is able to update team efficiently on progress and needs
- An interest in and commitment to improving the lives of financially underserved individuals
- 1-2+ years prior relevant experience such as working in startup environments, nonprofits or other fast-paced environments preferred
- Bilingual English/Spanish strongly preferred
- Experience with Salesforce strongly preferred
- Ability to work evenings or early mornings
- Ability to carry/lift 35lbs

Neighborhood Trust is committed to a workplace culture of collaboration and respect. We are dedicated to ongoing professional development for our employees, supporting career growth and opportunities for advancement within the organization.

To apply please send resume and cover letter to hr@neighborhoodtrust.org. Include "Business Associate" in the subject line of the email.