Foundation Source

Job Title: Director of Strategic Alliances (“DSA”)
Supervisor: Head of Strategic Alliances (“HSA”)
Supervises: N/A
Position Type: Exempt
Location: Fairfield, CT
Date: 03/18/19

Overview of Position:

The Director of Strategic Alliances help will build and extend the company brand in all major markets and strategic alliance channels by working with the Head of Strategic Alliances to establish Foundation Source as the definitive source for all private foundation advice, education, thought leadership and services. The target markets include: wealth management firms, family offices, banks, trust and estate professionals, law firms and other agreed upon strategic alliance clients and prospects.

The Strategic Alliances team’s key objectives are to find new partners, enhance and expand existing strategic partner relationships, help Senior MDs, MDs, and BDAs develop deeper relationships within their regions, and contribute as necessary to close sales and deliver new revenue for the firm.

Essential Duties & Responsibilities:

- **Sales** - Work with the Head of Strategic Alliances and National Sales Executive during all stages of the sales process including sourcing and qualifying prospects, advancing the sales cycle, collaborating on due diligence and proposal writing, coordinating contract negotiations with CLO (Chief Legal Officer), and closing new business.
- **Education and Training -** Lead or participate in meetings, phone calls, events and training sessions with strategic alliance clients and prospects. Will be responsible for conducting webinars.
- **Client Service -** Develop and maintain excellent client service practices with Alliance firms; provide ongoing support customized for each partner firm which may include weekly, monthly, quarterly or annual calls, meetings and updates.
- **Marketing Collateral for Partners** – Work with Sales and Marketing to customize materials needed to support partner relationships.
- **Training Material** – Work with Sales, Marketing and Head of Strategic Alliances to develop training material and deliver it regionally as required.
- **Salesforce** – collecting, inputting and updating critical account, contact information, branch and regional manager information; especially completing Parent account and related account information in Salesforce; documenting all calls, emails, meetings, events, training sessions, partner documents, etc. so that they are easily documented and tracked with straightforward report generation.
- **Executive Updates** – collaborate with Head of Strategic Alliances and National Sales Executive in order to meet monthly with CEO to report on existing and new targeted partner activities.

Related Duties & Responsibilities:

- Contribute to and maintain the Strategic Alliance Sales Pipeline, generate proposals, develop and deliver presentations for prospects and provide regular reports as required by partner firms.
- Work with the MD/BDA teams to achieve their sales and relationship development goals.
- Collaborate with the Head of Strategic Alliances and Marketing to develop and deliver firm-wide sales initiatives and relationship enhancement strategies.
- Use Salesforce (generally daily), to communicate conversations (i.e. calls, meetings, events) appropriately and enter sales activity accurately, timely, thoroughly and professionally.

- Learn/understand our online private foundation software capabilities and give in-person demonstrations, online demonstrations (i.e. webinars) and/or training sessions of software (FSOL – Foundation Source On-Line).
- Work with Marketing, Client Services, Sales and the National Sales Executive to develop new processes and approaches to highlight our value proposition and range of services to clients and prospects.
- Work with Marketing, Head of Strategic Alliances and National Sales Executive to produce and maintain Strategic Marketing Kits, collateral and presentations.
- Assist in developing and presenting semi-annual Business Plan updates to the National Sales Executive and additional firm professionals.

Key Competencies:

- Highly organized
- Excellent verbal and written communication skills
- Thoughtful listening and questioning skills
- Confidence and knowledge to conduct effective presentations in person and via webinars
- Works well independently as well as being a collaborative and contributing team player
- Thrives in a high energy sales environment that is goal/quota driven
- High level of comfort working with wealth management/financial professionals, accountants, attorneys and other industry partners
- Familiarity with the tools and techniques of private foundations and philanthropy
- Travel to support objectives for sales, client service, and training/education efforts
- Proficiency with Microsoft Office Suite: Word, Power Point, Excel
- Knowledge of or ability to quickly pick up and use: Salesforce, Concur, GoToMeeting/Webinar and related tools
- Ability to use of SalesForce.com daily to enter, track and communicate conversations, e-mails, and meetings as appropriate

Personal Traits/Strengths:

- Attention to detail and strong planning, organization & time management skills
- Ability to juggle multiple projects
- Ability to work independently and also participate and contribute as a member of a team
- Comfortable interacting with high level wealth managers and the ultra-wealthy
- Image: poised, polished, professional and confident

Experience and Education:

- Bachelor's Degree
- 5 years of Business Development and/or Client Services experience working directly with clients and prospects
- Experience in the following fields is a plus: Financial Services, Philanthropy, Private Foundations, professional work or extensive volunteer engagement with charitable giving enterprises

Additional Considerations/Work Environment:

- Travel is required to support objectives including: training, client events, educational sessions, regional activities or other corporate purposes.

About Foundation Source:

Foundation Source is America's leading provider of support services for private foundations—from set-up and administration to high-level philanthropic advisory services. The company's full suite of back-office, online, and advisory services helps its foundation clients ease the administrative burden, engage board and family members, and deliver greater social impact.

Foundation Source's client base of foundations created and operated by high-net-worth and ultra-high-net-worth individuals and families has grown significantly over the years due to its innovative product offering and strong focus on philanthropy within the market. Today, Foundation Source serves over 1,500 private foundations nationally representing almost $14 billion in assets under administration. The company is headquartered in Fairfield, CT.

NOTE:

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.