

## **JOB DESCRIPTION: Sales and Onboarding Specialist**

### **Job Profile**

**Responsible to** Head Of Sales Operations and Relationship Manager  
**Location** Kaizen Reporting Limited, Dixon House, 1 Lloyd's Avenue,  
London EC3N 3DQ

### **Overview**

Kaizen Reporting is a multi-award winning RegTech company on a mission to transform the quality of regulatory reporting in the financial services industry. We've combined regulatory expertise with advanced technology to develop our market-leading quality assurance services. Unique in their ability to fully assess data quality, our services are used by some of the world's largest investment banks, asset managers, hedge funds and brokers, helping them to reduce costs, improve quality and increase confidence in their regulatory reporting.

### **Job summary**

An essential role within a rapidly growing company, Kaizen is looking for a Sales and Onboarding Support Specialist to join the team. The role will work with the Client Facing team providing sales support and overseeing the end-to-end client onboarding process.

### **Key activities and responsibilities**

- **Oversee the onboarding of clients by;**
  - Liaising with Relationship Managers to provide improvements in the client onboarding process
  - Ownership of client onboarding process
    - Liaising with client on onboarding steps
    - Ownership of onboarding documentation
    - Reviewing onboarding documentation to ensure completeness
    - Working closely with clients to ensure completion of all relevant onboarding steps
    - Ensuring all client updates are managed and tracked in the CRM software.
  
- **Support the Sales team by;**
  - Capturing clients and relevant client information and details in our CRM software
  - Analysing and interpreting data present within the CRM software
  - Producing sales presentations for the Sales Individuals
  - Drafting of KYC documentations and RFP/RFI responses.
  - Coordinating of legal documentations, e.g. MSA, SOW and NDAs
  - Producing cost proposals for clients
  - Updating all contact information for clients
  - Working with Sales individuals to suggest and implement sales process improvements

## Person specification

### Skills

- Advanced Microsoft Office with high proficiency in Word, PowerPoint and particularly Excel
- Excellent verbal and written communication skills
- Basic mathematical skills
- Strong attention to detail
- Strong analytical, organisational, and time management skills
- A commercially focused mindset
- Ability to adapt well to change.
- Languages (preferably French)

### Experience

- Previous experience using a CRM tool and techniques would be beneficial
- Proven ability to build and maintain client and stakeholder relationships all at levels
- Experience of effectively managing multiple tasks and delivering in a fast-paced environment to tight deadlines
- Track record of implementing new ideas and challenging the status quo
- Experience working in financial services or sales would be advantageous.

### Knowledge

- Some knowledge about financial services/instruments will be beneficial

### Qualifications/Training

- Degree or equivalent experience

## What you'll get in return

- A competitive compensation package
- Private healthcare, gym membership contribution and regular team socials
- An empowered culture of innovation and collaboration
- Opportunity for career growth and to play a key role in a pioneering growth company.

For further information, please contact [careers@kaizenreporting.com](mailto:careers@kaizenreporting.com)