# **Designation:**

Manager-Business Development

# **Company Profile**

Asset Vantage was founded in 2011 by a family office and technology group as a next-generation, SaaS technology-based asset management, accounting, and reporting system catering to the highly demanding needs of customers ranging from individual wealth holders to fully staffed family offices and those professionals that serve them. ***Our vision is to empower families and their trusted advisors to make better investment decisions with a complete picture of their wealth.***

Our fully configurable family office software platform provides financial data aggregation across all asset types, an integrated general ledger for accounting/reconciliation and comprehensive portfolio reporting/analytics across all asset classes, currencies, advisors, and geographies.  
***We are the one-stop software solution to help family offices run like a business.***

More than 300+ of the world’s wealthiest families, representing combined assets of over USD 300 Billion in value, use our platform to automate their operations to drive better financial outcomes. We serve them through single-family offices, multi-family offices, CPA firms, trusts and financial institutions. ***AV has the distinction of being the only platform that’s truly global serving users across the Americas, UK, Middle East, Asia, and Oceania.***

AV’s best-in-class technology, combined with its premium managed services, offers an unparalleled and highly configurable solution at a fully transparent and competitive price point. ***The holy grail of value that family offices have always been searching for is now here.***

For more information, visit [www.assetvantage.com](http://www.assetvantage.com)

# **Job Roles & Responsibilities:**

* Perform market research to identify prospective clients
* Create strategies for business development by researching target demographics, economic trends, customer needs and interest areas
* Oversee efforts to expand lead generation through cold calling, emails and other methods.
* Build a strong working relationship with customers to increase the potential of business opportunities
* Present sales pitches, product reports and other valuable data to potential prospects that helps them identify the need for the product
* Study each product offered by the company and persuasively educate and inform customers of how each works and its specifications
* Understand how to upsell and recommend complementary services
* Maintain potential customer accounts to generate new income and achieve sales targets
* Manage BD activities to achieve sales objectives and profitability Participate in trade shows, sales meetings, webinars and training sessions
* Develop new prospects through referrals, networking, online research and outbound calls
* Research and update the contact details of potential customers in customer database. Keep data on your prospects and customers updated on the CRM platform.
* Prepare relevant reports for various business development activities.

# **Technical Skills:**

* Experience reaching or exceeding weekly/monthly activity goals/quotas
* Hands on experience with multiple sales techniques (including cold calls)
* Understanding of sales performance metrics
* Good knowledge and experience working on MS Office
* Familiarity/Hands-on experience working on a CRM software is an added advantage

# **Personality & Interpersonal Skills:**

* Strong communication and relationship-building skills. Ability to understand and explain complex product features and processes.
* Strong problem-solving skills with the ability to identify issues and implement effective solutions.
* Ability to streamline functions and passion to learn and grow.
* Ability to deliver engaging presentations

# **Qualifications and Experience:**

•     4-6 years of relevant work experience in Business development roles/customer service/sales positions

* Min. Graduate in Business / Finance
* MBA Preferred

# **Location:**

**Mumbai**

**Working Days: - Monday to Friday in work from office mode**