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## JOB DESCRIPTION

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**Job Title:** Business Development Executive

**Grade:** C

**Department:** Business Development, Giving and Impact Services

**Main purpose of job:**

*As a key member of the new Business Development team, you will proactively support the growth of philanthropy products offered by CAF's Giving and Impact Services Division. This role will focus on researching new prospects, managing leads and pipeline tracking, coordinating key meetings and events, and working with our Private Client, Corporate and Impact Accelerator teams to identify and progress new opportunities for growth.*

**Responsible to:** *Business Development Manager (Individuals)*

**Budgetary responsibilities:** *None*

**Responsible for:** *None*

**Key Job Responsibilities:**

- Researching new prospects and introducer firms across Private Client products
- Managing incoming leads by tracking and triaging new enquiries and ensuring consistent communication and handling of prospective clients
- Coordinating meetings, presentations and events for key SME's within the Giving and Impact Division in order to promote our philanthropy services
- Analyse leads and prospects in order to ensure that business development activities are correctly targeted, cost effective and converting successfully
- Help prepare proposals and pitches for new business opportunities
- Support the day to day tracking of the Business Development budget and research opportunities for growth through sponsoring industry conferences, events and publications
- Prepare management information to inform Senior Managers and Executive Committee's on the current status of our business development pipeline by collating and inputting into key scorecards and reports.

**General responsibilities**

- Continuing education through seminars, conferences and related training to promote skills growth and development in sales, business development and prospecting
- Develop detailed knowledge of CAF's full range of services and the wider impact economy
- Deliver high quality customer service, both proactive and responsive, to ensure that partners, clients and internal stakeholders are always highly satisfied and engaged

- Be proactive in the suggestion and development of new work processes and procedures, assisting with the implementation of solutions where required to continually improve pipeline management
- Proactively participate in positive communication between the various CAF teams.
- Participate in the performance management system by:
  - Achieving personal and team goals as agreed with Line Manager.
  - Giving and receiving feedback
  - Gathering evidence to support performance
  - Supporting less experienced team members with training and guidance as required

## **CAF Values and Behavioural Indicators**

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

**Date: October 2024**

## PERSON SPECIFICATION

**Job title:** Business Development Executive  
**Date:** October 2024

Attributes	Essential ✓	Desirable ✓	How Evidenced <sup>†</sup>
<b>Experience</b> Understanding of business development, sales, prospecting Experience with B2B business development and sales Understanding of charitable or financial services sectors	✓	✓ ✓	
<b>Qualifications</b> None required.			
<b>Training</b> Sales training		✓	
<b>Specialist Skills/ Ability/Knowledge</b> Ability to build and maintain relationships Use of CRM for sales prospecting and logging Demonstrate ability to successfully negotiate and influence Knowledge of philanthropic and/or financial services products Computer literacy Excel	✓ ✓ ✓ ✓ ✓	✓	
<b>Communication</b> Excellent verbal and written communications Positive communication and team work with internal teams and stakeholders Excellent, professional communication with external prospects and third party introducers	✓ ✓ ✓		
<b>Personal Qualities</b> Great attention to detail and organisation skills in order to track, log and analyse opportunities Positive, solution focused attitude Friendly, supportive approach to team work Self motivated and focused on completing tasks Good time management and organisation skills	✓ ✓ ✓ ✓ ✓		
<b>Special Conditions</b> Some evening hours required for attending and supporting events	✓		
<b>Prior to Appointment</b> All posts: <ul style="list-style-type: none"> <li>• Credit Check</li> <li>• Sanctions Check</li> <li>• Basic DBS Check</li> <li>• Employment References</li> <li>• Medical Clearance</li> <li>• Right to Work in the UK</li> </ul> FCA Approved Posts: <ul style="list-style-type: none"> <li>• Standard DBS Check</li> </ul>	✓ ✓ ✓ ✓ ✓ ✓ ✓		R/E

✓ Tick either the *Essential* or *Desirable* column as appropriate for each attribute

† Insert the code from the key below for how you intend to assess this requirement e.g. at interview, via references etc.

**Key**

**R** = References, **E** = Evidence/Certificates, **A** = Application, **C** = Competency Interview, **T** = Testing/Assessment