
JOB DESCRIPTION

Job Title: Senior Product Manager, Investments

Grade: E

Department: Product

Main purpose of job:

We are seeking an experienced and strategic-minded Senior Product Manager to join our growing Product team. This role will play a crucial role in shaping and executing our investment product strategy to ensure CAF offers the best possible service to our donors through a range of investment options including impact investment.

As the Senior Product Manager for investments, you will be responsible for overseeing CAF UK's investment solution for our donors, working with the front-line business owners to articulate a clear strategy and future requirements. You will collaborate closely with cross-functional teams, including IT, Private Clients, Transformation, Operations and Finance, building an Investments centre of Excellence to ensure the successful development and delivery of innovative investment solutions. Your expertise in the investment landscape, technology market trends, and customer needs will be key to defining and executing our investment product roadmap.

Responsible to: Head of Product, Donors & International

Budgetary responsibilities: None

Responsible for (staff/jobs): n/a

Key Job Responsibilities:

- **Creation of a strategy:**
 - Develop and execute a comprehensive investment product strategy aligned with our Group aspirations that covers; pricing, innovations and opportunity, review of service and overall investment experience for CAF and its clients in the UK.
 - Conduct market research, competitor analysis, partner and client feedback to identify opportunities and challenges.
- **Develop clear product development roadmap:**
 - Detail requirements in collaboration with our Transformation team for our future investment solutions
 - Define, prioritize, and communicate the investment product roadmap to internal stakeholders.
 - Collaborate with and lead cross functional teams to create effective go-to-market strategies.

- Be at the heart of the development process, ensuring timely delivery of high-quality investment solutions.
- **Build an Investments Centre of Excellence:**
 - Deep understanding of investment industry, supporting technology, platforms, and providers.
 - Own knowledge and information on our investment ecosystem for donors at CAF.
 - Design and deliver product specific training, especially in relation to any changes or enhancements introduced.
- **Commercial management:**
 - Strategically lead the process to search, select and onboard new partners, working closely with procurement. This will include commercial negotiations, contractual set up & strategic oversight.
 - Support Procurement in ongoing supplier reviews from a product management and development perspective.
- **Performance / KPIs:**
 - Establish and monitor key performance indicators (KPIs) to measure the success of investment products and services at CAF.
 - Produce the financial income modelling needed for any income forecasting and target setting purposes.
 - Analyse data and user feedback to iterate on existing features and identify opportunities for improvement.
- **Risk & regulation:**
 - Ensure all investment function controls, processes and governance are effective, customer focused and compliant with applicable legal and regulatory requirements as well as CAF policies.
 - Stay abreast of all regulatory market changes.
 - Collaborate with legal, finance and compliance teams to ensure our products adhere to relevant standards.
 - Responsible for representing and protecting CAF's reputational risks in relation to investments.

Requirements:

- You will have at least 5 years of experience in product management, preferably in the investment or wealth management sector.
- You have a strong knowledge of the UK investment market, products, and regulations, and a passion for delivering customer-centric solutions.
- You have excellent communication, presentation, and stakeholder management skills, and can influence and align diverse teams and perspectives.
- You have a proven track record of delivering successful products from ideation to launch, and managing complex projects in a fast-paced environment.
- You have a data-driven and analytical mindset and can use various tools and methods to measure and improve product performance and customer satisfaction.

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: September 2024

PERSON SPECIFICATION

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Date: September 2024

Attributes	Essential ✓	Desirable ✓	How Evidenced
Experience			
• Experience of developing and implementing new investment solutions	✓		A/C
• Experience of working in an investment-related industry		✓	A/C
• Experience of developing and delivering product strategies and plans	✓		A/C
• Experience and proven success in translating business analysis and human needs into successful consumer products	✓		A/C
• Track record of managing complex stakeholder relationships, including interacting with and influencing executives	✓		A/C
• Experience of building high-performance teams and driving cultural change	✓		A/C
• Proven track record in delivering results	✓		A/C
• Experience of stakeholder management	✓		A/C
• Product Management experience	✓		A/C
• Project Management experience		✓	A/C
• Direct customer service/client relations experience		✓	A/C
• Proven experience of budgeting, reporting and analysis, P&L management	✓		A/C
• Previous experience of digital products/channels	✓		A/C
Specialist Skills/ Ability/Knowledge			
• Understanding of the investment market, terminology and key players.	✓		A/C/T
• Understanding of agile methodologies and confident discussing technology and its consumer applications – APIs, micro-services, cloud, mobile, and the Internet	✓		A/C/T
• Excellent teamwork skills	✓		A/C/T
• Using collaborative culture to drive results	✓		A/C/T
• Strong analytical capability	✓		A/C/T
• Ability to formulate product strategies and plans	✓		A/C/T
• Working knowledge of product management tools	✓		A/C/T
• Ability to manage cross-functional teams to deliver business results	✓		A/C/T

<p>Communication</p> <ul style="list-style-type: none"> • Excellent written, verbal and presentation skills (up to Director level) • Strong interpersonal skills 	<p>✓ ✓</p>		<p>A/C/T A/C/T</p>
<p>Personal Qualities</p> <ul style="list-style-type: none"> • A passion for leading, motivating and managing a team • Sound commercial acumen • Willingness and excitement to delve into data and systems and be comfortable with complexity • Results driven • Clear strategic thinker • Proactive problem solver • Ability to prioritise own work according to wider CAF objectives • Self-motivated, energetic and enthusiastic 	<p>✓ ✓ ✓ ✓ ✓ ✓ ✓</p>		<p>A/C A/C A/C A/C A/C A/C A/C</p>
<p>Prior to Appointment</p> <p>All posts:</p> <ul style="list-style-type: none"> • Credit Check • Dow Jones Check • Basic DBS Check • Employment References • Medical Clearance • Right to Work in the UK 	<p>✓ ✓ ✓ ✓ ✓ ✓</p>		<p>R/E</p>

Key

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