

ImpactAssets

Director of Business Development & Strategy

Position Specification



IMPACTASSETS

INVEST WITH MEANING



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Position Specifications

Role Specifics	
Position	Director of Business Development & Strategy
Company	ImpactAssets
Location	San Francisco
Reporting Relationship	President and Chief Investment Officer
Website	www.impactassets.org

Company Background, Culture & Organizational Values:

Empowering Access to Impact Investing

In 2010, ImpactAssets was spun out of [Calvert Impact Capital](#) in recognition of the growing need to increase flows of capital to the world's greatest challenges. Since its inception, ImpactAssets has become the leading facilitator of direct impact investing. The company is best known for its Donor Advised Fund, The Giving Fund, but it also has managed investment products and portfolios for taxable accounts.

The ImpactAssets Giving Fund, a donor advised fund (DAF), was created "of, by and for impact investors" to provide a flexible solution for the innovative and creative impact investing that philanthropists were seeking. The portfolio represents more than 500 impact investment positions and nearly \$500 million in assets.

The ImpactAssets investment platform includes public and private debt and equity funds, model portfolios, Impact Notes, a Seed Ventures Fund and 300+ direct company investments aligned to the UN Sustainable Development Goal framework.

ImpactAssets is also dedicated to field building through the [ImpactAssets 50](#) database of private debt and equity fund managers, [The ImpactAssets Handbook](#) for Impact Investors and the [ImpactAssets Issue Brief library](#).

The organization's success is testament to their highly-engaged 1000+ clients, strategic partners, board and team. ImpactAssets has ambitious plans to build out and enhance client experience through diversified investment options, custom investment strategies and increased opportunities for community interaction and collaboration. The organization is poised to double, triple and quadruple in size over the next few years with a honed product, sales and marketing strategy.



Why ImpactAssets?

ImpactAssets has grown rapidly the past five years. Even when considering outflows for participant philanthropy (grants), they have grown at a rate of approximately 25% annually and are looking to grow to a multi-billion-dollar Impact Investing organization from their current asset base of \$500mm. With an impressive list of high profile impact investor clientele, this is an entrepreneurial, innovative, fun and creative organization.

In addition to investing in the firm's approved funds and model portfolios, clients may also source and recommend their own private impact investments. In 2018, ImpactAssets' clients invested \$65M across 94 private impact deals, bringing the firm total to nearly 500 private impact investments. Q1 2019 is on pace to double last year's investment rate. The firm also offers investment products outside of the DAF as well as a Seed Ventures Fund and Impact Notes. This line up of impact investing opportunities is ImpactAssets' key differentiator and competitive advantage.

In recent years, the firm has seen interest from several key markets and is currently underway in strategic planning to identify and prioritize these markets, understand the product strategy, service model and hiring strategies necessary to support the efforts to capture these market opportunities.

Because we are all impact investors ourselves, the culture at ImpactAssets is highly supportive, collaborative, entrepreneurial and warm. We are all very passionate about changing the world and while there is respect for work-balance, we work hard to achieve our goals. Preserving this culture is paramount to us.

Key Responsibilities

The Director of Business Development & Strategy will be responsible for developing the ImpactAssets sales strategy, a cutting-edge sales process and system and, instilling a world-class sales culture within the organization.

As Strategist...

- Assist the President in the expansion plan for ImpactAssets and, as a member of the firm's Leadership Team, participate in strategic planning and other seminal leadership initiatives
- Set Sales Strategy for the pursuit of 3 new and distinct markets (that the firm has initial traction in) as well as setting strategy for the existing markets
- Work closely with the Head of Marketing to align Business Development & Strategy strategy and develop marketing programs to drive sales
- Regularly bring market insights back to the organization to inform business planning, product strategy and marketing

As Builder...

- Build a high performing, multi-channel sales team through technology, process, coaching and hiring
- Lead the effort to instill a Salesforce culture in the firm, including fundamental processes for setting targets, managing accountability, pipeline management and closing activities
- Participate in the creation of a production-based compensation plan

As Player/Coach...



- As a player/coach the Director will oversee the 4-person existing sales team as well as take an active role driving sales of the current Donor Advised Fund to ImpactAssets clients which include; family offices, RIA's, institutions, corporations, high net worth investors and other Donor Advised Funds.
- Work with the investment community as an adept company ambassador as well as creatively expand the ImpactAsset's presence in the market
- Play an active role in cultivating and closing large, high priority accounts
- Provide consultative solutions and creative thinking to the sales team

Professional Experience/Qualifications

- Proven ability to develop and execute upon a sales strategy, determining how to best utilize the existing sales team as well as senior leadership (sales management experience highly desired)
- Experience with building or implementing processes or having worked in an organization with world class technology and processes and can apply those best practices in new situations (highly desired)
- Prior experience in creating and implementing sales strategy for a new market a plus
- Strong individual sales capabilities and experience developing relationships with family offices, corporates, institutions or ultra-high net worth investors and entrepreneurs desired
- At least 10+ years' experience in investment sales
- A creative thinker with a high degree of versatility who can take in market feedback to improve offerings
- Ability to hire, train and mentor strong sales talent
- A high degree of tenacity
- Ability to travel as needed to help drive sales
- Bachelor's degree required, advanced degree or certifications preferred



Contacts

Kelly Martin
Managing Consultant

T +1 (512) 426-2196
kelly.martin@kornferry.com

Bill Meskimen
Senior Recruiter

T +1 (404) 983-7228
bill.meskimen@kornferry.com

Gloria Mirrione
Sector Leader

T +1 (212) 973-5881
gloria.mirrione@kornferry.com

Kristen Parish
Recruitment Coordinator (Scheduling)

T +1 (214) 740-2675
kristen.parish@kornferry.com

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