

Job Title: Vice President, CRM and Sales Enablement Lead

Location: New York, NY

About Neuberger Berman, LLC: *Neuberger Berman* is an independent, employee-owned, global asset management firm, serving the financial needs of institutional and individual investors worldwide. Our broad capabilities include traditional and alternative equity and fixed income strategies, private equity and commodities, in addition to portfolio advice and wealth planning services. We offer a broad platform to accommodate the evolving needs of our clients.

CRM and Sales Enablement Lead

The CRM and Sales Enablement Lead is the primary owner of the CRM data platform and Salesforce.com solutions that support our global sales, client services, marketing and business intelligence teams. The CRM Lead will oversee a team of CRM Administrators and Analysts, guide efforts of our IT development team, and be the primary liaison to our Salesforce.com user community.

The role's purpose is to coordinate the strategic and tactical assessment of the firm's sales and service processes, to design and continuously improve our data and application models, and to oversee the execution of vital business requirements. The business objective is to drive salesforce adoption and enable analytically-driven sales enablement reporting and assessments, across all channels, leveraging internal and external data

- This leader will need to champion and drive through necessary CRM changes ensuring full buy-in from all stakeholders in the business
- S/He will have the ability to collaborate across the enterprise, building relationships with key stakeholders both with Client Coverage and throughout Neuberger Berman
- This person will have extensive experience as a people leader, investing and growing talent
- The person will setup and lead a steering committee comprised of key internal clients and partners across business and technology to report progress on the initiative
- S/He needs to strike the right balance between technical know-how and business understanding to work with multiple business stakeholders to drive tangible use cases, and with technology team and vendors on the implementation of agreed solutions

Responsibilities:

- Manage a team of people in business roles working with technology to deploy models and strategies especially focusing on sales processes and our CRM model
- Lead efforts to define the strategy, design and execution of the components of CRM deployment
- Ensure return on investment through KPI's and performance metrics.
- Focus on and improve CRM and sales management process

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- Drive creation and maintenance of sales enablement playbook with clearly defined robust, consistent processes
- Lead global adoption and use of CRM platform with an eye to improve user experience including mobile
- Understand best practice sales, operations and marketing processes, and align technology solutions to optimize those processes across the business
- Ensure the CRM provides an effective sales funnel and efficient sales process.
- Analysis of the current CRM and ensuring it's fit for purpose and the goals of the organization
- Work closely with clients from the organization to turn data into critical information and knowledge that can be used to solve key use cases
- Be a thought leader in deployment solutions, change management, and stakeholder influence and buy-in

Requirements:

- Bachelors' or Masters' degree in Business Administration, Computer Science, or related field
- 8 - 10 years' experience on Salesforce platform
- 5 - 10 years' experience in Financial Services preferably Asset Management
- 3 – 5 years' of progressive leadership experience, including managing staff who routinely engage with technology to assess, construct and deliver functionality
- Expert proficiency in Salesforce.com administrative processes and architectural constructs
- Very strong project and program management experience – Workfront or similar experience preferred
- Able to connect seemingly unrelated questions, problems, or ideas from different industries or fields to deliberately assemble new perspectives or realign those of others and the organization
- Ability to manage analytic/technical and also business professionals successfully and communicate analytic results to non-technical partners
- Able to be independent and a self-starter, comfortable in a fast-paced matrixed environment
- Strong execution skills and results oriented approach
- Act with curiosity and take initiative to identify problems, offer creative solutions and resolve issues
- Proficiency in Tableau, Alteryx and Conga highly desirable

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