Job Title: Marketing Operations and Investor Engagement Manager

**Position objectives**

The Marketing Operations and Investor Engagement Manager is responsible for developing, maintaining and optimising all investor campaigns and communications. The role is critical in the success of targeting aligned investors, building relationships with investors, executing segmented campaigns, collecting and organising data, as well as generating high quality leads.

**Key responsibilities**

* Build, implement, monitor, and improve Forager’s investor engagement strategy. Own and perform all aspects of email campaigns, from design to writing, segmentation, strategy, all the way through technical development.
* Establish, manage and optimise the ongoing investor engagement strategy and activity, including communications, webinars, sponsorships, and roadshows, to increase investor engagement, satisfaction, and retention.
* Manage technical aspects of key marketing systems (Marketo, Salesforce and CMS) used to generate, distribute and report on leads through to end client. This includes deep understanding of how the systems talk to one another, and drive continual improvement through fine-tuning various configurations to ensure all data and investor information is handled properly.
* Work with the sales & marketing teams to create emails, forms, reports, and other related infrastructure to support campaigns. This role is key in the integration of sales and marketing activity, allowing Forager to become more effective in our initiatives.
* Establish and maintain scalable processes that ensure best practices in campaign and lead management, and are aligned with producing optimum customer experiences. This includes continuing to monitor, refine and improve customer communications and campaigns through ongoing optimisation.
* Proactively explore data to find trends, discover KPIs, and apply hypothesis testing. Forager’s approach is to drive continual learning through an iterative test and learn approach.
* Provide recommendations that enhance future campaign performance and measurements.
* Produce and maintain performance metrics reports and dashboards on marketing and sales activities, effectiveness, and business impact. Communicate these results across the business to support key decision making.
* Evaluate new technologies and add-on applications to improve and optimise marketing team performance.
* Maintain marketing database health and compliance with regulations, including GDPR. This includes Document and evangelize best practices and governance policies.

**Qualifications**

* Degree in Bachelor of Science, Business, Data and/or related fields
* Highly regarded: active interest and experience in wealth management products and services
* Five years+ experience with Salesforce and Marketo in a marketing operations role (or something similar).

**Skills**

* Outstanding analytical skills
* Understanding of the relationship between a marketing automation platform and Salesforce, and how campaigns/data is synced, as well as the field mapping processes. Hands on experience is a must.
* Experience building Salesforce dashboards and setting up campaign attribution programs
* Marketing automation experience across multiple products and customer segments
* Attention to details
* Interest, passion and commitment to investing
* A can-do and curious attitude
* Flexibility and willingness to work outside of typical business hours
* Interpersonal skills and fostering relationships with both internal and external stakeholders including but not limited to marketing, investment managers and analysts, sales & client services, public relations and external agencies.

**About Forager Funds Management**

Established in 2009, Forager Funds Management is an Australian-based asset manager that focuses on long-term investing in equities markets. The firm takes an active, value investing approach – looking for lesser-known stocks that offer undiscovered opportunities for higher returns. Through its Forager Australian Shares Fund and Forager International Shares Fund, the team remains nimble enough to invest in smaller listed companies not accessible by many investment managers. The company is majority owned by staff and key investment staff are strongly aligned with investors through co-investment and equity in the Forager business. For more information visit [www.foragerfunds.com.au](http://www.foragerfunds.com.au)

Recruitment notes:

This is a very hands-on role and small organisation that allows for exposure to a wide range of activities.