Job Description

Manager, Strategic Alliances

Company Overview
The Financial Planning Association is the largest membership organization for personal financial planning experts in the U.S. FPA currently has 23K members, 17K of which are CFP certificates out of a population of close to 70K CFP certificants. Members of FPA are those who commit to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. They deliver advice using an objective, client-centered, ethical process. FPA membership consists of financial planners and all those who support the financial planning process. FPA 's purpose is to serve its members through focusing on and delivering products and services which support practitioners and the financial planning community.

Position Summary
The Manager of Strategic Alliances is responsible for the maintenance and development of strategic alliances (including affinity programs) to aid in the creation and/or enhancement of member benefits, products and services. This includes management throughout the product/service/benefit lifecycle, gathering and prioritizing member requirements, and working closely with various FPA departments and outside vendors to ensure revenue and member satisfaction goals are met.

Primary Duties and Responsibilities

- Proactively develop member benefits and appropriate strategic alliances in order to drive recruitment and retention of individual as well as Institutional members.
- Form strategic alliances with other organizations and vendors to deliver benefit to members that bolster membership loyalty.
- Develop and maintain a new FPA Member Benefits Website Module, incorporating industry best practices to present FPA member benefits in a clear, easy to use and easy to find manner.
- Analyze data on member demographics, preferences, needs, and buying habits to identify potential markets and factors affecting demand and member preferences.
- Manage and build revenue streams for FPA's products, benefits and services working with key staff members in various departments.
- Work with marketing staff to correctly identify target markets and appropriate message platforms
- Work with business development staff to identify appropriate participation and alignment with FPA in order to meet revenue targets
- Measure and assess member preferences and expectations of new and existing benefits, products and services.
- Forecast and track marketing and sales trends, analyzing collected data based upon assessment of ROI associated the Member Benefits program
- Seek and provide information to help FPA determine its position in the marketplace
- Gather data on competitors and analyze their prices, sales, and method of marketing and distribution

Supplemental Duties and Responsibilities

- Travel, as needed, to meet with existing and potential new alliance partners
- Responsible for the creation of the budget and management of revenue and expenses for the FPA Member Advantage Program

Knowledge, Skills & Abilities

- Excellent analytical, organizational, writing and oral communication skills
- Proven negotiation and contract development skills
- Excellent interpersonal skills
- Proficiency in standard business software (Microsoft Office Suite)
- Experience in Salesforce.com, a plus

Education & Experience

- Bachelor's degree in business or other field
- Five to seven years of financial services industry experience in a business development capacity a plus
- Established track record in working with affinity programs

Travel up to 10%

Reports to: Director, Corporate Relations