



**Title:** EMS Consultant (Business Consultant)  
**Classification:** Full-time exempt, permanent hire  
**Department:** Equity Management  
**Reports to:** Marcus Hagood, Director of Valuation Services

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**Objective:**

To enable our members to focus on business decisions and outcomes that matter that build long term sustainable value.

**Summary:**

The Business Consultant conducts the onboarding, planning, assessing, and retaining our most valued clients. This performer exists to enable our client's long term, independent and sustainable growth by advising them to focus on decisions and outcomes that matter. Our Business Planning Process leverages market- and equity-based valuation, best-in-class peer group benchmarking, and industry insight to ultimately drive top- and bottom-line performance. We introduce best practices to our members and offer comprehensive solutions to address clients' business needs.

**Essential Functions (detailed tasks duties & responsibilities):**

**Account Management:** Delights the client by developing relationships and deep understanding of our client's business needs and goals. Combines knowledge of clients' needs with our core consulting disciplines to meet or exceed business unit goals for membership enrollment conversion, retention, and new engagement opportunities. Monitors the communication between various departments to make sure that the customer service team is getting the information they need to improve customer satisfaction. Works closely with key customers to keep them updated on process changes designed to improve service.

**Planning & Assessment:** Independently leads the annual planning process in order to optimize the business valuation according to clients' stated goals; identify and prioritize business goals and objectives to produce a Business Financial Plan that grows, protects, and transitions enterprise value.

**Business Plan Reviews:** Manages scheduled consulting and accountability check-ins to monitor process against the business objectives, value growth goals, and transaction opportunities; updates the Business Financial Plan.

**Product Development:** Participates in structured design of education & training, consulting process, deliverables, and touchpoints for the Business Financial Planning Process in order to ensure predictable and scalable processes to meet or exceed revenue and profitability goals.



### Competency or skill requirements:

- **Business Knowledge:** Understands wealth management organizations, systems, and practices. Understands regulatory structures for insurance and financial products and services and how they impact the operations and suitability of business structures and decisions. Understands basic taxation impacts within various business models (or can learn). Understands the performance levers that can be optimized to increase the value of various business entity structures. Understands the competition; is aware of how strategies and tactics work in the marketplace.
- **Consulting Ability:** Must have competency in reviewing profit and loss statements. Understands the business and key performance indicators that drive insight to action for growth. Can learn new industry, company, product, or technical knowledge; picks up on nuance quickly. Uses rigorous logic and methods to solve difficult problems with effective solutions. Is excellent at honest analysis and can see hidden problems; looks beyond the obvious and does not stop at the first answers.
- **Planning & Time Management:** Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results. Uses time effectively and efficiently; concentrates efforts on the more important priorities; can attend to a broader range of activities.
- **Communicating Effectively:** Is effective in a variety of formal presentation settings; is effective both inside and outside the organization, on both data and controversial topics; commands attention and can manage group processes during the presentation; can change tactics midstream when something is not working. Is able to write clearly and succinctly in a variety of communication settings and styles.
- **Relationship Building:** Relates well to all kinds of people; builds rapport to create constructive relationships; uses diplomacy and tact; can diffuse even high-tension situations comfortably. Is dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes trust and respect.

### Education and Experience (required levels):



- Bachelor of Business Administration (BBA), Bachelor of Science, Business Administration, Finance/Economics or equivalent of education and experience required, MBA preferred.
- 4 years' experience as a business or management consultant, preferably working with financial advisors who provide insurance and wealth management professional services.

**Workload Breakdown:**

- Lead 150+ Advisory Businesses annually within partner program membership.
  - 30% of time spent as Account Manager.
  - 70% of time spent as Business Consultant.
- This role will partner with the following FP Transitions teams: Consulting, Analytics & Research, Valuation, Legal, Advisor Services and Corporate Services.

**Physical factors & working conditions:** This position may require sitting or standing for long periods of time. Presence in the Portland metro area is preferred, although applicants will be accepted nationwide. Remote candidates must have a dedicated workspace with reliable high-speed internet connection. Some travel may be required for conferences, strategic planning or client meetings, not anticipated to be more than once per month.

**Date revised: July 21, 2022**

