

Job Title: Associate, Client Experience

DirectBooks is a growth-stage fintech startup backed by the largest global investment banks. We are optimizing the primary issuance process for both the sell-side and buy-side, including corporate bonds, emerging markets, SSA, and high yield debt.

We are seeking a highly motivated individual to join our Client Experience team in New York. As part of a client-facing team, you will have a tremendous opportunity for growth while delivering results. You will be responsible for managing the relationships with our largest sell-side and buy-side accounts, understanding their workflows and feedback, and driving their feedback into action internally.

The ideal candidate will be flexible, thoughtful, organized, and have a strong bias for action. You are a clear, confident communicator who can attack complex problems, but also take a step back and contribute to the company's long-term strategy. Ideally, you have a working knowledge and understanding of capital markets, particularly corporate credit and the primary issuance process.

What you'll be doing:

- Managing the relationships with key sell-side and buy-side DirectBooks clients
- Training and onboarding new clients
- Help manage the deal lifecycle via live support to both the buy side and sell side
- Developing best practices for using the product via a deep understanding of primary issuance workflows
- Be the "voice of the client" for the client's needs and be able to identify product and service delivery gaps
- Drive actions identified from data to improve client experience
- Create and track key usage and data metrics to assess product performance and quality control
- Communicate regular updates to clients and DirectBooks' lines of business including presentations and executive summaries
- Work on cross-team projects aimed at delivering new functionality to our clients focused on enhanced data analysis, reporting, and integrations

What we are looking for:

- 3+ years with a focus in finance or economics, at a small fintech company, a capital markets/syndicate role at an investment bank, or on the buy side focused on corporate credit
- Strong analytical skills with the ability to recognize key trends and insights and the ability to explain findings to a senior audience
- Expert Excel spreadsheet and PowerPoint skills, creating and maintaining strategic and client-facing material
- Superior written and verbal communication skills with comfort interfacing with senior internal and external business leaders. Comfort presenting to large groups of people
- Capable of managing multiple business critical workstreams in a demanding and dynamic work environment



- Exceptional attention to detail and organization skills
- Selfless team player
- Uncompromising integrity

Note: we use years of experience as a guide, but we certainly will consider applications from all candidates who are able to demonstrate the skills necessary for the role.

Compensation Details

- Anticipated base salary range of \$75,000-95,000
- Annual performance incentive
- Equity
- Competitive benefits (health insurance, 401k, other perks)

To apply, send a resume and why you'd be a good fit to talent@directbooks.com

DirectBooks provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

For more information, contact: <mailto:talent@directbooks.com>