

Job Title: Analyst / Associate, Client Experience

DirectBooks is an early-stage fintech startup founded by 9 of the largest global investment banks. We are optimizing the primary issuance process for both the sell-side and buy-side, starting with corporate bonds.

We are seeking a highly motivated individual to join our Client Experience team. You will be responsible for managing the relationships with some of our largest sell-side and buy-side users, understanding their workflows, and driving their feedback into action internally. 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 front-end sell-side and buy-side DirectBooks clients throughout the client lifecycle
 - Training and onboarding new clients
 - Increasing use and adoption of the platform
 - Understand and manage client feedback to improve platform and use
 - Determine fit for future product rollouts
- Continue to build the client community across the sell-side and buy-side communities
 - Develop deep understanding of end-to-end issuance processes for fixed income securities
 - Analyze differences between different securities and impact to product and workflow for both sell-side and buy-side
 - Developing best practices for using the product and improving workflows across the primary issuance ecosystem
 - Drive actions identified from data to improve client experience
- Partner with the product team in designing and enhancing the platform.
 - Be the "voice of the client" and work with product team to identify solutions
 - Identify key success criteria for enhancements
 - Socialize key changes with the community and refine
- Create and manage client metrics and reporting
 - Create and track key usage and client data metrics to assess adoption and how clients utilize the platform
 - Work with community to improve data quality and timeliness
 - Work with data team to automate reporting

What we are looking for:

- 2-4+ years' experience at either a fintech company, a capital markets/syndicate role at an investment bank, and/or deep understanding of credit products
- 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, python and data visualization expertise added plus

- Exceptional written and verbal communication skills with comfort interfacing with senior internal and external business leaders.
- Ability to present clearly 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

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.