

# progeny

<b>Role Profile:</b> Data Architect	<b>Reports to:</b> Chief Technology Officer
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## About us

Progeny is a professional advisory firm providing integrated financial and legal services for private clients, businesses, family offices and charities.

Everyone is an individual and we take care in building successful relationships providing the highest quality service. We believe in accountability and personal commitment and always seek to do the right thing for clients, colleagues and community.

We are very proud to be Progeny. Our unique blend of financial and legal expertise nurtures wealth- for today, for tomorrow and for generations to come.

## Job Purpose

Progeny are currently entering an exciting phase of growth and succession, which has in turn lead to an investment in the expansion of the Technology division. Progeny currently has a variety of disconnected data sources and platforms. The role of the Data Architect will be to lead a team to integrate these platforms, providing the data foundations for the digital transformation of the business. The Data Architect will enable data-led decision making which in turn improves both the business as a whole and the individual client experience, in line with our connected strategy and our business values.

## Responsibilities & Accountabilities

- Gain deep understanding of our existing data systems (CRMs etc.), their features and limitations, and the opportunities they provide for data integration and insight.
- Build upon our existing systems and research, plan and implement new systems where necessary to enable the business to get the most out of its data.
- Create strong and efficient systems and processes to enable team members across the business to maintain the validity, cleanliness and utility of the data they are responsible for.
- Implement systems and processes to allow team members across the business to easily gain relevant insight from data held by the business, e.g. real-time reporting

*\* This role profile is not exhaustive; team members will be expected to carry out additional duties as required to meet the ongoing needs of the business.*

dashboards and insight tools, replacing the need for labour-intensive creation of monthly MI dashboards.

- Manage the Data Insight team, working closely with the IT and Innovation teams within the Technology department, and grow the team over time.
- Manage projects and the workload of the team, ensuring that projects are delivered in line with defined budgets and timescales in an efficient, cooperative manner.
- Work with the Chief Technology Officer to set the technology vision for the business in line with our business vision, mission and values.
- Work with stakeholders across the business to seek out opportunities and implement new systems and processes.
- Work with external parties, such as technology vendors and consultants, to ensure that the business utilises the best technology solutions in a cost-effective manner.
- Represent the Technology department professionally and with credibility, demonstrating confidence and skill to the leadership team, team members and other stakeholders.
- Stay on top of industry trends and developments and maintain full knowledge of the development roadmaps of our systems to ensure that Progeny stays up to date with developments and ahead of our competitors.

#### **Qualities, skills & attributes**

- At least three years' experience in a similar or closely related role.
- Experience leading a project or team to integrate existing data systems for the purposes of business insight.
- Experience managing other data specialists.
- Excellent people, communication and management skills are essential to work closely with team members and stakeholders across the business to deliver on the goals of the team.
- Deep understanding of data and a broader understanding of technology and the business.
- Experience in the professional services (financial/legal) industry would be advantageous.
- Experience working with Intelligent Office (IO) and/or Peppermint (built on MS Dynamics) and/or Xplan would be a significant bonus, or alternatively experience working with other data platforms (e.g. Salesforce, PowerBI or Qlik)

#### **Team Benefits**

- Competitive salary

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- 25 days holiday plus bank holidays
- Birthday holiday & long service holidays
- Paid volunteering day
- Group Pension Scheme
- Private Health Care Scheme
- Life Assurance Scheme

### **Progeny's Values**

Progeny are driven by our values; they are what collectively unite us and ensure the success of our mission "to be the most trusted professional advisory in the UK and beyond".

- **Group Wisdom**
- **Empowering Others**
- **Agility**
- **Social Responsibility**
- **Long-term Thinking**

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