

# progeny

<b>Role Profile:</b> Innovation Manager	<b>Reports to:</b> Chief Technology Officer
---	---

## 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. The role of the Innovation Manager is to plan, develop and roll out innovative technology solutions that deliver improvements to our business and to our client service, in line with our connected strategy and our business values. This role requires a blend of technical, creative and people skills and will be well-suited to a candidate who is willing to get stuck in to implementation work as well as operating at a more strategic level. At Progeny, we are a small team with huge ambitions, and this role will be key to securing our planned growth in the coming years. This role offers significant scope for career development and growth, in line with the growth of the Innovation team.

## Responsibilities & Accountabilities

- Gain deep understanding of our existing technology systems (CRMs, platforms, tools, etc.) and business processes, and seek out areas for improvement.
- Develop and implement technology solutions (including developing software) to create efficiencies and improvements that lead directly or indirectly to better client service.
- Work with the Chief Technology Officer to set the technology vision for the business in line with our business vision, mission and values.

*\* 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.*

- Over time, strategize, plan and recruit an Innovation team - a small team of software/web developers and other specialists who will assist you in delivering on innovation goals. Then manage the team on an ongoing basis.
- Manage innovation 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 closely with the IT and Data Insight teams within the Technology department to deliver a unified technology strategy.
- Work with stakeholders across the organisation to manage an effective, transparent and efficient innovation and change process on both a technology and a human level.
- 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 technology 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, including significant software and/or web development experience.
- Excellent people and communication skills are essential to communicate the needs and goals of the business, the opportunities that technology creates, the abilities and needs of team members, and the practicalities of processes and organisational change.
- Broad understanding of technology and the business.
- Demonstratable experience within a management role with significant software and technology skills.
- Confidence with the capability to plan and recruit a team over a period of several months, in line with the strategy outlined by the Chief Technical Officer.
- 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 valuable however not essential.

*\* 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.*

**Team Benefits**

- Competitive salary
- 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**

*\* 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.*