

Investment Practice Manager



The Investment Practice Manager plays a critical role within Tregaskis Brown's leadership team. They are responsible for leading and growing our Investment Practice so that it is the primary 'go to' for senior executives seeking high quality investment decision-making support and smarts.

We have a highly regarded business case, ILM and portfolio management capability and we're looking for an engaging and thoughtful manager to lead and grow this part of our business.

This is a new role within the Tregaskis Brown leadership team, and we need the right person to work with us as we evolve our company and take it to the next level.

This is a full time, permanent position.

Mō mātou | Our Organisation

We're a growing mid-sized, Wellington-based consultancy specialising in developing and implementing business improvement and change across the State Sector. We're large enough to provide the capacity and capability our clients need - and small enough to be agile and responsive.

The Tregaskis Brown team has expertise in all aspects of successful business performance and change. Our services range from strategic thinking and investment decision-making through to hands-on change and project delivery.

Our team has a broad mix of skills and a depth of expertise. We make a point of keeping up to the minute with the latest developments in our specialist fields. For two decades, we have built a reputation for clear and creative strategic thinking - and for being 'a safe pair of hands' in making change happen.

We are proud of our high standard of professionalism, and we have a reputation for being easy to work with. We value a collaborative approach and actively seek long term partnerships with our clients. More than 80% of our business comes from clients who have engaged us previously.

At Tregaskis Brown we value:

- Integrity
- Commitment to long term, mutually productive partnerships
- Expertise tempered with pragmatism
- Excellence in service delivery

Tregaskis Brown will...

- Be a company the Investment Practice Manager can be proud of and enjoy working with.
- Support the Investment Practice Manager so they can do their job well.
- Provide opportunities to learn and grow.
- Offer a competitive salary and a benefits package including additional paid leave, contributions to health and wellbeing costs, flexible working arrangements and career development. Employer contributions to Kiwisaver are in addition to the offered salary

Kōrero mō te tūranga | About the role

The Investment Practice Manager plays a critical role in contributing to Tregaskis Brown as a successful and resilient consulting company through the growth of a sound and credible Investment Practice.

The position is responsible for leading the growth and development of the Practice. This includes:

- Ensuring our Investment Practice has the right capabilities and capacity in place to deliver high-quality services and support to our clients.
- Leading the development of collateral, frameworks, and tools in accordance with current good practice and industry standards to support our people and/or our clients.
- Ensuring our team shares knowledge and insights with evolving international and domestic 'good investment practice', including growing the capability of the practice in Business Case thinking and development, and Portfolio Management.
- Identifying, securing, and supporting high quality staff and associates.
- Ensuring there is the right level of oversight, support, and pastoral care for those working within the Investment Practice team.
- Leading the business development effort to secure ongoing work for the Investment Practice and provide input to the company's broader marketing activities.
- Initiating, developing, and maintaining strong and trusted client relationships across the State Sector.
- Developing, managing, and reporting on the Investment Practice's annual and long-term plans, ensuring these are aligned with, and contribute to the company's wider strategic, business and marketing plans.
- Investigating, recommending, and implementing improvements to the business where appropriate.
- Being an active member of the Tregaskis Brown Management Team, assisting with broader leadership aspects of the company.

Reports to:

- The Chief Executive

Direct Reports

The Investment Practice team reports to this role and this will range from Principal through to Graduate Consultants and contracted Associates and Partners. Not everyone working within the practice will be direct reports to the Investment Practice Manager, requiring effective matrix management working arrangements.

Key Relationships

- The Tregaskis Brown Board & Partners
- The Tregaskis Brown Management Team
- Staff and Associates
- Clients, prospective clients, and their representatives
- Professional Networks

Confidentiality and security

Everyone in Tregaskis Brown is expected to maintain high ethical standards. The whole team must fully comply with all the contractual requirements for each assignment undertaken by the company regarding confidentiality and ownership of intellectual property.

Clients may sometimes require security clearance for Tregaskis Brown personnel assigned to, or associated with, their work. This may include authorisation to obtain a record of each team member's criminal history from the Ministry of Justice, citizenship, and/or the provision of significant and potentially intrusive personal information, including information about your wider family. All our employees must be able to pass all required security clearances to do their work.

Kōrero mōu | About you

Most important to us, is that the Investment Practice Manager is committed to, and excited about, seeing Tregaskis Brown grow and succeed. We expect the Investment Practice Manager to:

- Employ a systems thinking view and approach to the practice and the organisation
- Have high levels of self-belief but low levels of ego – being low maintenance and easy to work with is important to us.
- Be highly professional in the way you present yourself, your approach to clients and delivering the mahi.
- Have proven business acumen.
- Be a competent relationship manager in a wide variety of circumstances and enjoy working collaboratively as part of a team.
- Have highly developed ethical and professional values.
- Be comfortable with change and ambiguity
- Be resilient and tough-minded.
- Have a wide and active professional network.
- Demonstrate superior workload and time management skills.
- Be able to lead, manage and coach people in a friendly, constructive way.

Qualifications and Experience

- Recognised expertise in some or all areas of investment decision-making and support, including, but not limited to, Business Case development, Investment Logic Mapping (or similar), Portfolio Management and other relevant investment support and decision-making methodologies.
- You must be a highly experienced, tertiary qualified professional with experience relevant to investment decision-making and portfolio management.
- You will have a good knowledge of the state sector (public sector agencies, crown entities, local government) and have an extensive network of potential client relationships and resources.
- Experience in identifying and developing business leads is desirable, along with a knowledge of the sales cycle.
- A full driver's licence is highly desirable.
- You must be a citizen of NZ.

Mō te tūnga | Responsibilities of the role

This is a brand-new role. You will be building the function and helping us to think through the concept of practice leads and therefore potentially have a formative role in how our business develops. The responsibilities for this position are likely to shift over time, as the function continues to develop and the wider environment changes. There is an opportunity to shape this role as it evolves. The duties set out below are not intended as a definitive list, but to provide an overview of the role.

Leadership of the Investment Practice Team

- Lead the Investment Practice function, including capability and capacity planning, from recruitment through to the professional development, performance, and retention of a great team.
- Manage the resourcing and allocation of personnel to assignments.
- Contribute to developing and maintaining systems to ensure the quality expectations for assignment delivery is clear and consistently achieved by all consultants and associates.
- Ensure the company's collateral and methodologies reflect current good practice and industry standards and are easily accessible to the consulting team.

Service Delivery

The Investment Practice Manager will ensure there is appropriate development and oversight across all relevant assignments and services. This includes:

- Ensuring our people provide high quality advice and support, ensuring our clients' expectations are always met or exceeded.
- Providing oversight of assignments, or ensuring a Principal Consultant or Partner is providing oversight where this is appropriate.
- Ensuring Tregaskis Brown's internal assignment management processes are followed – and assist with continual improvement of these processes.
- Ensuring every client engagement with Tregaskis Brown is thoroughly professional, high quality, 'low maintenance' and good value for money

Service Development and Growth

- Develop the marketing plan for the Practice and ensure the activity relating to securing work is successful.
- Lead the growth and development of Investment support services.
- Identify new or emerging lines of business or services and develop the capacity and capability to provide them to a high level of quality.
- Seek out and nurture new business opportunities for Tregaskis Brown generally.
- Develop effective client relationships that ensure ongoing business opportunities are identified and realised.
- Be responsible for the development of specific proposals and tender documentation.

Business Management

- Develop and lead the annual business planning and performance for the Investment Practice within the context of the company's overall strategic, business and marketing plans.
- Lead the required reporting against the plan to the broader Management Team and assist the CE with reporting to the Board as appropriate.
- Ensure that administrative systems like invoicing, contract management and assignment information are completed accurately and in a timely way.
- Help the company to continually improve its systems and administrative practices.
- Ensure costs are managed within agreed budgets.

Tregaskis Brown Leadership

- Consistently model the Tregaskis Brown values and behave as a leader of the company in all circumstances.
- Contribute to and/or lead team events, functions, and meetings.
- Contribute to the development and achievement of the company's strategic, business and marketing plans as part of the management team.