

Investment Associate – Job Description

Role Purpose:

The role holder will be part of a small, agile and highly motivated team, responsible for the implementation and continued development of the business plan for CPI Enterprises. CPI Enterprises is the investor engagement and ventures arm of CPI. Our short-term objective is to develop a vibrant network of angel, venture capital (VC) and corporate VC investors targeting technology/IP-based companies and facilitate investment into high-growth, early-stage companies. In the medium term, we aim to establish a strategic approach that combines public and private investment to develop technology-based areas of the UK economy and direct investment to early-stage technology companies. We are also responsible for CPI's investment portfolio and for developing innovative business opportunities arising from CPI's IP, assets and know-how.

The role holder will be responsible for researching and analysing the private investment community in order to inform a business development plan and support relationship management activities. The role holder will also support the MD with the active management of CPI Enterprises' investment portfolio and analysis of potential investment opportunities as and when they arise.

Key Responsibilities:

- To embrace and role model the desired behaviours to exemplify our Company values, promoting an ethical, positive company culture.
- To maintain consistent and documented compliance with all relevant Safety, Health and Environmental (SHE), Good Manufacturing Practice (GMP), Data Integrity (DI), quality and best practice requirements
- To undertake research and analysis of (private) investment trends to inform our activities and to connect partner investors with high-growth early-stage companies, consistent with the CPI Enterprises Business Plan
- To undertake market analysis to inform the development of appropriate value propositions for investors
- To prepare briefings on key investors for other team members to inform and support their relationship management activities
- To keep the core team up to date in terms of investment trends, news relevant to partner investors and next generation technology relevant to CPI's capabilities
- To collate, organise and analyse Group held data and produce insights and case studies in order to build CPI's credibility with the private investment community
- To analyse the Group's commercial customers and identifying those with high growth potential
- To act as a filter for potential internal opportunities referred to CPI Enterprises by other teams or committees, (i.e. bids team, IP Committee or BD team), within the Group
- To contribute towards the performance of due diligence on investment opportunities, the preparation of investment theses to the CPI Enterprises Investment Committee as and when they arise and assisting with company valuations
- To assess/value CPI internal business opportunities, making recommendations as to potential markets and contributing towards the production of business plans as required
- To use CPI's proprietary Innovation Integrator assessment as a means of identifying and analysing opportunities

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- To support the MD with reporting requirements and preparation of agendas, reports and papers for the Investment Committee and various Boards
- To recommend processes and procedures for recording, monitoring and reporting key metrics
- To be flexible and undertake all activities that are linked with ensuring the role and CPI enterprises objectives are met

Direct reports: No direct reports

Person specification

Education / Qualifications:

Essential:	Desirable:
Degree level (or equivalent) plus significant relevant experience in strategic marketing, finance or investment analysis roles <u>or</u> Educated to master's degree level (or equivalent) or above in a Scientific/Engineering or Business Related (such as Marketing, Finance, Economics) discipline plus relevant experience in strategic marketing, finance or investment analysis roles	

Competencies and behaviours	
Leadership (Influencing)	Decision Making (Influencing)
• Promotes commitment to our PRIDE values strategy, vision, and direction • Motivates, inspires and builds resilience in others by making the vision shareable by everyone and ensuring that teams are purposefully empowered in order to work efficiently • Rewards and celebrates success with colleagues and teams • Future proofs work practices • Trusts others' judgment and demonstrates radical thinking, including a willingness to try new things, even at the risk of failure	• Confidently draws reliable conclusions from diverse and sometimes incomplete data. • Proactively sources and refers to how others have tackled similar problems previously. • Considers risks, and consequences, and takes accountability for, the impact the decision has on the business including costs/ benefits. • Thinks ahead, ensuring that the potential of teams and projects are unlocked and making future focused decisions. •

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Communication (Influencing) - Comfortably employs a wide range of communication styles and approaches to suit different situations and audiences (external and internal stakeholders) in diverse situations - Builds effective two-way communication channels within the business area and across departments whilst maintaining credibility and securing commitment	Developing self and others (Enabling) - Supports others in their development - Is personally committed to, and actively seeks opportunities to improve continuously - Is comfortable learning from the experiences of others and recognises the differing strengths of team members - Provides honest helpful feedback to others on their performance - Insightful about self, strengths and limitations, and how to maximise contribution
Collaboration (Influencing) - Blends people into teams, leveraging the use of talents available from any part of the organisation that result in the most innovative solution - Fosters a sense of energy, ownership, and personal commitment to collaborative work, ensuring that diverse people are able to collaborate openly and honestly as one team even with differing views and perspectives - Understands the priorities and deeper needs of different stakeholder groups, being sensitive to different experiences - Supports and enables people to work together to meet objectives	Delivery (Influencing) - Prepares and maintain schedules for activities and events for projects. - Delegates responsibilities for tasks and decisions to the appropriate staff; sets SMART objectives and monitors progress fostering an atmosphere of purposeful empowerment in order to allow teams to function efficiently. - Researches capabilities and constraints, in advance of a project, which could affect its approach and outcomes. - Holds people accountable for achieving results.

Knowledge and Experience:

Essential:	Desirable:
Demonstrable knowledge and experience of investing in early-stage technology companies	Relevant experience working with venture capital funds, family offices, HNWs, etc.
A proven track record of assimilating complex data and synthesising into clear, unambiguous business proposals and recommendations for decision making	Relevant experience of operating within an innovation, research and development environment
Demonstrable track record of working with collaborative teams and leaders in organisations	Relevant knowledge/experience of the innovation eco-system and investors in early-stage companies
Experience of analysing, visualising and communicating data in a compelling way	Expertise in automating data processing tasks (e.g. using Excel VBA) and workflows, e.g. using Microsoft Flow, Python, etc

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Proficient in Excel and confident MS Office
365 user (Word, PowerPoint, OneDrive, etc.)