



## About the Company

Eton Solutions is a hypergrowth fintech transforming the Family Office segment of the Wealth Management industry. Eton Solution's AtlasFive® is a comprehensive enterprise management platform specifically designed to allow today's modern Family Office meet the unique and varied

For More details please visit: <https://eton-solutions.com/>

**Role Description:** The primary objective is to assist in the execution of family office operations services by overseeing staff training, work planning, communication with all the stakeholders, drive improvement initiatives. Customer satisfaction and employee satisfaction are important criteria for success. Their responsibility also includes maintaining books and records of client investments in hedge funds, private equity, and personal assets.

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**The outcome for individuals against the categories above is measured via C-sat, E-sat, attrition, and employee growth.**

### Job Description:

- ***Formulate business strategy with others in the executive team***
- Design policies that align with the overall strategy
- Implement efficient processes and standards
- Coordinate customer service operations and find ways to ensure customer retention
- Ensure compliance with local and international laws (e.g. data protection)
- Oversee the implementation of technology solutions throughout the organization
- Manage contracts and relations with customers, vendors, partners, and other stakeholders
- Evaluate risk and lead quality assurance efforts
- Oversee expenses and budgeting to help the organization optimize costs and benefits
- Mentor and motivate teams to achieve productivity and engagement
- Report on operational performance and suggest improvements
- Setup and manage India Operations
- Design the Operations methodology, templates, and tools to run operations efficiently
- Hire the right staff to ensure customer requirements are delivered in time with quality
- Participate in review calls with clients on a weekly/monthly basis to ensure their requirements are understood and met

- Ensure Operations and Implementation teams are trained well enough to take on new activities from existing /new clients
- Coordinate with the Implementation team to ensure that clients are moved to BAU in a phased manner with the least disruptions
- Ensure there is adequate staffing for new and Existing business requirements
- Develop the Statement of Works (SoW) for BAU clients and have them signed off
- Provide the executive management with MIS to make informed decisions on scaling
- Formulate business strategy with others in the executive team for local operations as well as at the organizational level
- Design policies that align with the overall strategy for BLR
- Implement efficient processes and standards that align with global requirements
- Coordinate customer service operations and find ways to ensure we scale our services with each client
- Ensure compliance with local and international laws (e.g. data protection), SOC, etc.
- Manage contracts and relations with customers, vendors, partners, and other stakeholders.
- Empanel vendors post negotiation on price and service quality.
- Evaluate risk and lead quality assurance (QA) and quality control (QC) efforts
- Oversee expenses and budgeting to help the organization optimize costs and benefits.
- Mentor and motivate teams to achieve productivity and engagement.
- Report on operational performance and suggest improvements.
- Designing policies, overseeing customer service, and implementing technology solutions within Operations.
- Committed to productivity and compliance
- Ensure operations run smoothly and that people are productive.
- Ensure metrics and measurements are in place and followed by everyone in the organization.
- Determine hardware and software requirements for the business and work with the IT vendor to procure and install.

**Position requirement:**

- 18 -23 yrs experience\* in the Operations domain
- Should be CA/CFA/CPA Qualified.
- Enthusiastic team player who enjoys both strategic and hands-on work
- Ability to analyze problems and develop creative solutions to complex product issues.
- Strong interpersonal, communication skills, and have the ability to work effectively with employees of all levels.