

## Position: Research and Marketing Analyst

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*A leading Northern California Investment Banking and Private Equity firm is seeking a proven, motivated research analyst to expand its position as a market-leader by spearheading its research, marketing, community outreach efforts.*

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**Company:** DCA Partners, LLC helps business owners and management teams maximize the value of their business at all stages of its lifecycle. We have three distinct operating groups that companies can call on depending on their specific need at the time:

1. Buy-side M&A Advisors: Help companies grow through acquisition
2. Private Equity: Provide equity capital to help fuel growth or enable an ownership change
3. Sell-side M&A Advisors: Ensure businesses get a premium value in a sale of the Company
  - a. Pre-Exit Planning to help companies prepare for a near-term exit at maximum value

**Responsibilities:** The Research and Marketing Analyst will work closely with the Firm's team members to support client projects by providing market analysis, industry research and Company research with a goal of maximizing the value of the services DCA provides in all three business segments. The analyst will also promote the brand and service offerings of the Firm as well as oversee its community outreach, education and philanthropic events.

**Core Activities:** The Research and Marketing Analyst will support the Firm's research efforts as needed for client engagements. Additionally, this position will be the lead person focused on the firm's written and digital communication and engagement with its prospects, clients, referral network, strategic partners and broader community. Specifically, he/she will spend time doing the following:

### Research

- Perform extensive research to build a detailed understanding of the target market, industry, company or opportunity (including competitive analysis)
- Analyze and synthesize research findings to develop valuable insights and strategic recommendations for our internal decision makers and/or clients
- Research potential target companies for both sell-side and buy-side clients including contact information and other pertinent details
- Research Target lists for buy-side and sell-side M&A engagements
- Organize and help manage resulting target company information in an easy to read, consistent, navigable format
- Design and create client-ready presentations in Microsoft Powerpoint, Word, and/or Excel
- Design and develop client Confidential Information Memorandums (sell-side clients) or Company Overviews (buy-side clients) based on Company provided information and independent research

## Marketing

- Manage the Firm's CRM system and Pipeline reporting in conjunction with its Business Development Director
- Facilitate engagement with DCA's strategic partners and sponsors through events, presentations, webinars, white papers and other outreach
- Maintain the DCA website with timely updates on events, press releases and other new content
- Establish analytics for events, email marketing campaigns and other client engagements to understand how each marketing activity turns into clients, and continually refine DCA's processes
- Facilitate the logistics and content of webinars, speaking engagements and other marketing events, including working with vendors, strategic partners, design teams and DCA's team members from conception through completion and follow-up
- Coordinate fundraising efforts and applicable logistics of DCA's philanthropic outreach events
- Collaborate with the Business Development Director and the other DCA team members to develop content and marketing materials for the Firm's website, DCA Success Series events, press releases and other marketing opportunities
- Work to create scalable processes that ensure best practices in lead generation, event execution and database management
- Serve as Chairperson for DCA's annual Capital Cup 3-day golf event each fall

## Requirements/Skills:

- BA/BS degree in business, finance or accounting
- Experience analyzing quantitative and qualitative data
- Ability to manage multiple projects at the same time in a fast-paced environment
- Ability to work independently as well as part of a team
- A dual-minded approach: You're highly creative and an excellent writer but can also be process-driven and detail oriented, tenaciously willing to dig deep to find needles amid haystacks
- Excellent communicator and creative thinker, with strong writing skills
- Technically capable with a desire to improve processes
- Experience with Microsoft Office Products including Word, Excel and PowerPoint
- Proficiency in Wordpress.org software and some experience with HTML coding preferred
- Experience using a CRM system to manage client relationships

**Compensation:** The position provides for a competitive salary (based on experience level), Company bonus plan, health benefits, and 401(k), and a collaborative, positive work environment.

**At will employment:** The Analyst is strictly an at-will employee, and either the Analyst or the Company may terminate employment at any time, with or without cause or good reason. Nothing in this document, or any alleged conversations or representations of either party, will modify this at-will arrangement.

For more information, please contact [careers@dcapartners.com](mailto:careers@dcapartners.com).