

## Head of Training

Reporting to: Director of Membership, Enterprises, Marketing & Engine

Salary: £70,000 - £80,000 depending on experience

Date: March 2025

## The Investment Association

“At the IA, we are committed to serving our members, embracing new ideas and striving for excellence. We are inclusive, considerate and act with integrity in all we do.”

We are the trade body and industry voice for UK investment managers. We champion the investment management industry.

The UK investment management industry plays a major role in the economy, helping millions of individuals and families achieve their life goals by helping grow their investments (mainly through workplace pensions). In fact, 75% of UK households use an investment manager’s services (knowingly or unknowingly). The industry also invests, billions of pounds in companies and the financing of transport networks, hospitals, schools, and housing projects. The industry supports 126,400 jobs in the UK, including 13,800 in Scotland. It’s the largest industry of its kind in Europe, and the second largest in the world, after America.

Our members range from small, independent UK investment firms to Europe-wide and global players. Collectively, they manage over £9.1 trillion of assets on behalf of their clients in the UK and around the world. That is over 11% of the £81 trillion global assets under management. We act as their voice and represent their interests to policymakers and regulators and help explain to the wider world what the industry does. We help our member firms become better businesses.

We want our members to achieve the best results for their customers, both in the UK and internationally. To do this, we lead learning, training, and development initiatives to ensure compliance with the law and industry best practice – all while attracting a more diverse workforce into the industry. We also consult widely with members on issues affecting the industry, such as market trends, new technology, and data use.

## About the Membership & Enterprise Team

The Membership & Enterprise team is a combination of the Membership, Events and Training divisions. As the commercial arm of the Investment Association, we work closely with our members and affiliated firms to develop programmes and offerings which support the dynamic needs of our sector.

We focus on retention and growth of the IA membership by working with all internal and external stakeholders supporting on regulatory, policy, compliance, governance, and operational matters.

## Overview of the Role

We are looking for the right candidate to provide strategic direction, build and innovate training services for the IA's members. Our primary focus is to deliver regulatory and compliance-based training programmes designed for the Investment Management industry. There is also a requirement to assess the opportunity to develop soft skills learning as well as blended approaches to delivery.

The purpose is to raise industry standards of professional development through an evolving CPD programme, including classroom and virtual based training courses and workshops, in-house training and e-Learning. The training content delivered enhances and benefits IA members throughout the investment management industry – from new recruits into the industry through to Board Members and CEO's.

You will report directly to the Director of Membership, Enterprise Marketing, and Engine, with management responsibility for the Training Coordinator and Training Executive. This role requires close collaboration with the membership, events, and digital teams, while also fostering strong relationships with the wider IA policy teams and external stakeholders.

## Main duties in this role include:

- Strategic direction and responsibility for a first class training programme across a range of platforms, providing content primarily in line with industry trends, but with scope for development in new directions, and to best practice standards
- End to end management of open and in-house training programmes, working with external trainers and the training coordinator / administrative support to design, schedule, market and review education delivery
- Arranging ad-hoc educational in-house sessions for IA members, the regulator (FCA) and Government departments (HMT, HMRC)
- Expand the IA Learning e-learning content library
- Work with the Digital and Comms teams to design promotional strategies through various channels, including email, website and social media
- Maximise course revenues to attain income and profit targets and meet agreed attendance and feedback KPI's for all related training sessions
- Manage relationships with the professional training providers and other stakeholders
- Collaborate with department heads to ensure training aligns with regulatory and policy requirements.
- Engage and collaborate with internal policy teams on specific regulatory and compliance-based training content
- Assess training needs through surveys, interviews, and consultations with management.
- Evaluate the effectiveness of training programs through feedback and assessment tools.
- Identify potential knowledge gaps and suggest/source training solutions
- Lead and mentor the Training Co-ordinator and Training Executive, providing guidance and support for their professional development.
- Manage the training budget and resources efficiently.

## Skills and experience:

- Proven experience in training and development, with at least 7 years in a leadership role.
- Strong commercial awareness with proven budget responsibility
- Strong understanding of instructional design principles and adult learning theories.
- Excellent communication, negotiation, and relationship-building skills.
- Ability to work collaboratively with cross-functional teams and manage multiple projects simultaneously.
- Proficiency in using CRM, marketing and training software and tools.
- Strong organisation, team and project management skills
- Excellent communication and relationship management
- Innovative approach and strategic mindset

We welcome applications from all qualified candidates regardless of their ethnicity, race, gender, religious beliefs, sexual orientation, age, marital status or whether or not they have a disability.