LIFE IN FINANCIAL SERVICES AFTER AN MA?

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Director
AGENDA

- Back to the future
- The journey
- Career Path
- What else - recruitment
- Some tips along the way.....
- Questions
BACK TO 1987…..

- ‘Alice’ in Wonderland
- 3rd year –summer
- Binned ‘teaching’
- Binned French!
- Single Honours English
- Final year looming

No resits
No gap year
‘Real’ job
THEN.....FINANCIAL SERVICES

- Not considered
- Not very glamorous?
- Dull
- Boring
- Desk job?
- ‘Man’s world’ – in suits
- No maths?
- Could read.....
Now.....Financial Services

- 26 years in the industry
- Travel opportunities
- Financially rewarding
- Further qualifications
- Fitted in a family
- Huge network of friends and contacts
- Worked with many UK Financial Services Providers
- Speak at conferences
- Own Boss

But an interesting journey!
**Summer 1987**

- Boots to Standard Life – Summer job
- Edinburgh
- Major employer / well known
- Summer pay was good!
- Neighbour helped

Tip 1 – Use your contacts!
SUMMER 1988

- Degree in hand
- ‘Milk-round’ done
- Recruited to Graduate Management Trainee Course – 2 years
- Lack of maths – not questioned 😊
- MBA ahead
- Good salary and benefits!

Tip 2 – Understand the full package on offer
TRAINING PROGRAMME

- 2 years, 4 different placements (of varying quality)
- ‘Dogsbody’ – mail, coffee, errands, data input, stamp mail
- ‘Deep end’ – Crisis management, ‘sort out this team’
- Learning the lingo – Corre, Contracting out, LAPR….
- And the protocol – phones!

- Challenges:
  - ‘Young’, managing friends and old people
  - Studying (and partying?)
  - Long hours

Tip 3 – Adaptable, ‘can do’ mentality and be a good mail stamper!
CAREER PATH

- Project management – restructure, redundancies!
- Department Manager – 40 people and customers
- IT project manager – IBM
- Marketing – Pension Marketing Manager
- BABY 1 (terrible timing!)
MBA

- Too young – Certificate and Diploma first
- 4 main topics – Strategic Management, Creative management, HR Strategies, International business
- Summers schools
- Highly credible qualification
- Work experience
- Opportunity to study with people from all industries
- Thoroughly recommend
CAREER PATH

- Project management – restructure, redundancies!
- Department Manager – 40 people and customers
- IT project manager – IBM
- Marketing – Pension Marketing Manager
- BABY 1 (terrible timing!)
- Sales – National Development Manager, Products
- BABY 2 (slightly better timing!)
- Investment sales - Platform

Tip 4 – Grab every opportunity
What’s a platform?
THE TECHNICAL BIT...
What else...Recruitment

Recruitment for Graduate programme and Graduate Trainee mentor

- 2:1 on application
- 20 seconds per c.v. – critical!
- Everyone passes their driving test
- What is a real achievement??
- It’s not like the Apprentice! – there are no cameras
- Knife and fork
- Don’t lie
- 7 hour rule
- First impressions shouldn’t count.....but they do
- Use your mentor or find one

Tip 5 – Getting in can be tough
Tip 6 – If it’s not working, get out
WHAT ELSE…TRANSFERABLE SKILLS

- Presentation skills
- Press training
- People management
- Coaching
- Project management
- Business case
- Sales training
- IT skills

Tip 7 – Springboard for other opportunities!
WHERE AM I NOW?
WHERE AM I NOW?

- Running own business for over 3 years
- Work with some major clients (L&G, Aegon, Standard Life, Rathbone, ETF securities, Sense Network)
- Write articles and course material (IFP/ CII)
- Speak at conferences
- Babies are 17 and 13!! – survived
- Travel too much
- Still learning…..
- Don’t feel like I work in Financial Services
- Having fun – thanks to Shakespeare, Thomas Hardy, Scott Fitzgerald and some Psychology and Business Law thrown in

Tip 8 – Give anything a go at least once…