



Position: Product Manager

Type of Role: Full-time

Location: Remote until further notice. Upon reopening, a preference for our headquarters in Boston, MA; or our other satellite locations in Washington, DC or San Francisco, CA

Position Overview

Do you thrive in a fast-paced, collaborative environment with room for growth? We are a small team in a mission-driven startup working at the intersection of finance and impact to help our clients invest in social enterprises, impact funds, and transformative new ideas. Working at CapShift offers the opportunity for rapid development along with the ability to work with a diverse group of teammates.

CapShift is looking for a non-traditional Product Manager, someone who is comfortable working across technology needs, business goals, and client support:

- **Product Management** - Work with CapShift clients on technology requirements, development, implementation, and integration. Work with external development team to develop and test new product features for our industry-leading impact investing platform. Make recommendations on improved user experience and respond to user feedback. Work with CapShift team member to optimize the CRM and investment database for evolving team needs.
- **Internal Technology Management** – Work with external IT vendor to meet the evolving needs of CapShift team members and help with internal IT needs. Support annual security review needs and testing.
- **Analytics and Reporting** – Help CapShift improve its understanding of clients and prospects through robust data analytics and reporting across multiple web platforms and email communication. Make recommendations on ways to promote and measure engagement, oversee internal reporting needs.
- **Marketing** – Creatively leverage technology to reach our core customers through search engine optimization, drip campaigns, AI, and more.
- **Technical Customer Service** – Support CapShift clients with exceptional customer service when they have technical questions or need product demonstrations.

Qualifications

- Prior project management experience and an ability to critically review and prioritize projects based on business needs will be an asset in this role
- 3-5 years of work experience
- Experience working with JIRA and/or in an agile development process would be a plus; if you are a quick tech study you will pick this up fast
- Familiarity with Salesforce CRM; experience with Salesforce Communities and MarketingCloud is desired, but not required
- Experience working with web-based analytics and promotional tools
- Experience managing customer relationships and deliverables
- Experience in marketing and communication or collaborating with a marketing team is desired



- Fit with working in a high growth, flexible startup environment in which employees are expected to take on multiple responsibilities and leadership positions
- Proactive, thoughtful, self-motivated, detail oriented, organized, and able to effectively communicate across multiple business units and stakeholders.

We are looking for a new team member who is multi-dimensional, excited to be trained in new skills, and can take on multiple challenges and leadership functions as our team grows. If you think your skill set is a good match but you do not meet every qualification, apply and let us know how you're going to meet the demands of this role with your current experience and skill set.

About CapShift

CapShift's goal is to increase the flow of capital into initiatives solving global and local challenges. We manage a fast-growing impact investing platform that empowers philanthropic and financial institutions, along with their clients, to mobilize capital for social and environmental change. We work with many leading financial institutions in the \$120 billion donor advised fund market, including Fidelity Charitable and National Philanthropic Trust. Our suite of solutions makes it easy to source and implement impact investments that meet the needs of financial advisors, donor advised fund sponsors and their clients, foundations, asset management institutions, and more.

Our leadership has managed billions of dollars of impact investments in disruptive solutions in the health, education, poverty, community finance, clean energy, and sustainable food sectors. Our team combines deep impact investment experience with a nimble startup culture with the goal of mobilizing capital for social and environmental change. We are committed to building a diverse, talented team of young leaders in the impact investment space.

How to Apply

CapShift is an Equal Opportunity Employer and does not discriminate based on race, ethnicity, gender, religion, sexual orientation, age, physical ability, or involvement in the criminal justice system. We invite individuals with diverse life experiences and non-conventional backgrounds to apply.

Please submit your resume and a cover letter, that details your interest in the role and key qualifications or experience, with the subject Product Manager to jobs@capshift.com.

CapShift offers competitive compensation along with an opportunity for employees to receive equity in the business.