

Citisoft is a global consulting firm dedicated to enabling change in the investment management industry. Our consultants are industry experts who have delivered transformative initiatives for global asset managers, asset owners, insurers, and asset servicers. We are the most experienced consultancy in the industry, offering unmatched domain expertise and leading-edge insights into the technologies and trends that shape our clients' businesses. Through both strategic and tactical services, we partner with clients to drive technology, operations, and data initiatives from conception to deployment.

REPORTS TO: Chief Operating Officer and Managing Partner (US); Managing Partner (UK)

JOB SUMMARY:

The Director position within Citisoft, Inc. should have 15+ years of senior-level professional consulting experience in buy-side investment management operations and technology. In particular, this individual must have experience delivering, managing and completing large complex operational and systems strategy/integration/implementation projects. The Director role will have multiple responsibilities, including directing programs and/or multiple projects, defining the delivery approach for engagements, business development, and managing client relationships.

The Director will play a leadership role within Citisoft, and will be expected to perform at the highest levels of both client-facing and internal Citisoft initiatives that cover the spectrum of engagement types. The Director can be expected to drive across several levels on projects, including business development, program/project management or delivery-based standardization and industry standard practices across the Citisoft client base.

RELATIONSHIPS:

- The position reports to the Chief Operating Officer and Managing Partner
- Within Citisoft, the position has primary working relationships with executive management, delivery managing directors, the business development team, as well as all delivery consulting staff
- Externally, the position represents the firm and coordinates with the business development team to work with potential new clients, vendors, service providers, and industry conference sponsors

PRINCIPLE RESPONSIBILITIES:

Business Development:

- Independently identify, qualify, and pursue new business opportunities with existing clients, leveraging managing director, executive management, and business development support, as required (e.g., review and approval of proposal and commercial terms)
- Developing, maintaining, and growing client relationships
- Participating in client account strategy sessions
- Assisting with the development of proposals and required sales presentation materials, as required
- Independently initiate and manage the proposal process, craft the proposed solution and construct the core content of an engagement proposal

Client Delivery:

- Providing executive level advisory services respective to domain, solutions, and program/project execution
- Leading the definition of client and engagement specific services, approaches, and deliverables to be provided
- Assisting with the management of the financial aspects of client engagements including time and expense reporting
- Responsible for People Management covering all aspects of project staffing, including resource performance on delivery engagements
- Program Management-capable of successfully managing large-scale projects as the leader of a PMO
- Possess business skills required to drive deliverables and manage client relationships from a delivery perspective

Client Relationship Management:

- Participating in client status and steering committee meetings
- Establishing strong relationships with client executive project sponsors with responsibility for targeted revenue growth, account planning, and relationship management across key levels within the client organization
- Managing Citisoft and client commercial interests with respect to work effort, timeline, and quality of services

- Ensuring executive and stakeholder commitment to the Citisoft relationship and project work

Practice Development:

- Participate in professional development activities including staff project assessments, annual evaluations, coaching, mentoring, training and recruiting
- Directly responsible as a Reviewing Manager for the evaluation and professional development of assigned staff
- Takes a leadership role in the identification, creation and cataloguing of Citisoft best practice deliverables across all project types. Assist with the development and deployment of standardized delivery processes and tools that enable improved scale and delivery predictability in the Citisoft core business
- Participate in the development and execution of other resource management activities aimed at improving Citisoft people and delivery capabilities

Thought Leadership:

- Support Citisoft marketing efforts through participation in industry perspectives, white papers, blogs, media interviews, conferences, and vendor events

REQUIRED EXPERIENCE:

Extensive consulting experience managing large complex operational and systems strategy/conversion/integration/implementation projects and programs for institutional investment management firms and third-party service providers including:

- 15+ years delivering large and complex investment management operations and technology projects and programs; must include significant previous consulting experience
- Management of client relationships at the functional VP or c-level
- Proven ability to attract, develop, and expand both new and existing client relationships
- Demonstrated history of a sustained, repeatable track record of successfully managing large complex projects, programs, and relationships for large clients
- Demonstrated ability and experience building internal and external teams
- Experienced knowledge management practitioner, i.e. the Director will be expected to build knowledge capital throughout the organization both from a business development and delivery capacity

This position requires a combination of consulting, information technology, system and process re-engineering, work process design, and project/program management. Consequently, the skills and professional competencies required in this role include:

- Deep knowledge and experience with the prevalent systems and services in the investment management marketplace
- Strong background in operations and workflow analysis and design
- Comprehensive consulting skills and experience managing large and complex projects and programs
- Buy-side investment management domain knowledge within Citisoft's marketplace
- Proven ability to develop and train staff
- Excellent written and verbal communication skills
- Advanced MS Office skills including Word, Excel, Power Point, Visio, and Project

PERSONAL SKILLS:

It is expected that the Director will have the maturity and self-confidence in their skills and their ability to deliver what the position requires. The individual will need to establish credibility to work across many functional and reporting lines and build support for their efforts. At a minimum, the personal and leadership skills necessary for this role must include:

- Self-motivated to make change happen
- Commands immediate respect and attention
- Exemplary interpersonal skills and emotional intelligence
- Strong team player
- Maturity of perspective
- Intellectual spark and curiosity
- Highly developed reasoning and analytical skills
- Possessing a commercial view of the world
- Loyal, dependable, trustworthy
- Clearly exhibits the qualities of leadership-self-awareness, self-regulation, motivation, empathy, and social skills

LOCATION:

- The position will be Boston or London based with the expectation of extensive travel to client locations.

- Other travel to facilitate business development, conferences, etc., as required