

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 Principal Consultant should have 12+ years professional experience in buy-side investment management operations and technology. Specifically, this individual will have experience delivering large complex operational and systems strategy/integration / implementation projects. The Principal Consultant will be expected to perform at the highest levels of client-facing initiatives that cover the spectrum of engagement types. Citisoft projects cover all facets of the global investment management industry, including front, middle and back office initiatives.

The Principal Consultant will provide substantial subject matter expertise across the investment management domains within Citisoft's marketplace including:

- Portfolio analytics
- Trade order management
- Risk management
- Performance attribution
- Compliance
- Trade processing
- Data management
- Investment accounting
- Client reporting
- Fund accounting and administration

RELATIONSHIPS:

- The position reports to the Chief Operating Officer and Managing Partner (US); Managing Partner (UK)

- Within Citisoft, the position has primary working relationships with executive management, delivery managing directors and directors, the business development team, as well as all delivery consulting staff.

PRINCIPLE RESPONSIBILITIES:

Business Development:

- Maintaining, and growing client relationships
- Assisting with the development of proposals and required sales presentation materials including the ability to craft the proposed solution and construct the core content of an engagement proposal

Client Delivery:

- Leading the definition of client and engagement specific services, approaches, and deliverables to be provided
- Possesses business skills required to drive deliverables and manage client relationships from a delivery perspective
- Program/project management-capable of successfully managing projects encompassing operational and/or IT strategic roadmaps, evaluation and selection initiatives or large-scale implementation efforts
- The Principal Consultant should enable a seamless transition from the business development process, specifically allowing for a transition in responsibility from the MD/director to the appropriate individual on the Citisoft engagement
- Project delivery and deliverables-the Principal Consultant will be responsible for the highest standards of project delivery on each engagement; this entails rigorous adherence to such Citisoft standards including the document management lifecycle, project management checklist, project citation template, and similar tools
- Subject matter expertise-the Principal Consultant will be responsible for providing subject matter expertise to the business development and internal delivery teams on a variety of investment management domains

Client Relationship Management:

- Participating in client status and steering committee meetings
- Establishing relationships with client executive project sponsors and other key client project resources

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

Practice Development:

- Knowledge Management-assist with the development and deployment of standardized delivery processes and tools that enable improved scale and delivery predictability in the Citisoft core business
- Support Citisoft marketing efforts through participation in industry perspectives, white papers, blogs, media interviews, conferences, and vendor events
- Thought Leadership Support-represent Citisoft as a recognized expert within the investment management marketplace; this may include writing articles, participating in press interviews and speaking engagements
- Staff Mentorship-diligently work with Citisoft staff on project by project goals and objectives, taking a leadership role on specific professional development items with personnel

REQUIRED EXPERIENCE:

The Principal Consultant role requires an individual with strong consulting skills, as well as and thorough understanding of project management methodologies and framework. The Principal Consultant will work alongside the managing directors, directors and the consulting staff on a variety of internal and external project initiatives, but will retain the ability to work independently in a client delivery capacity.

The individual in this role should have extensive consulting participating in large complex projects in the investment management/financial services industries. This position requires a combination of consulting, information technology, system and process re- engineering, work process design and project management. Consequently, the skills and professional competencies required in this role include:

- Project management and consulting skills; candidate must be able to structure and manage projects to meet expectations and minimize potential obstacles and risk
- Significant buy-side investment management domain knowledge with the expectation that the individual could be considered a subject matter expert in a major functional area within the investment management lifecycle (trade management, portfolio management, investment accounting, data management, client reporting, data architecture)

- Client Relationship Management skills to effectively interact with clients at all functional levels up to the c-level
- Ability to mentor and develop staff
- Excellent written and verbal communication skills

PERSONAL SKILLS:

It is expected that the Principal Consultant will exude the confidence, maturity, and gravitas imperative when transitioning a client relationship and/or engagement from a Citisoft managing director or director. The individual must be adept at establishing instant credibility with the Citisoft client base through the use of a vast array of personal skills including:

- Commands immediate respect and attention
- Self-motivated to make change happen
- Exemplary inter-personal skills and emotional intelligence
- Strong team player
- Intellectual spark and curiosity
- Loyal, dependable, trustworthy
- Clearly exhibits the qualities of leadership
- Appetite, enthusiasm, and desire to initiate change and execute a strategy

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