

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 Senior Consultant should have 8+ years professional experience in buy-side investment management operations and technology. Specifically, this individual will have experience delivering and completing solutions-based services/integration/implementation projects. The Senior Consultant will assume hands-on role in the day-to-day delivery of mission-critical consulting services to our clients. Citisoft projects cover all facets of the global investment management industry, including front, middle and back office initiatives.

In addition, the Senior Consultant will provide substantial subject matter expertise across the investment management domains within Citisoft's niche marketplace-these include:

- Portfolio analytics
- Trade order management
- Investment risk management
- Performance measurement
- Portfolio management
- Trade operations
- Data management
- Investment accounting
- Client reporting
- Fund accounting and administration

RELATIONSHIPS:

- Annual reviews are conducted by senior leadership
- Management on project work is based on the project team structure and may include principal consultants, directors, managing directors, and executive management

- The position has primary working relationships across all levels of delivery consulting staff with the expectation of teamwork and collaboration

PRINCIPLE RESPONSIBILITIES:

Client Delivery:

- Possesses business skills required to drive deliverables and manage client expectations and acceptance of work
- Project delivery and deliverables-the Senior Consultant will be responsible for the highest standards of project delivery on each engagement; this entails rigorous adherence to Citisoft standards including the document management lifecycle, project citation template, and similar tools
- Subject matter expertise-the Senior Consultant will be responsible for providing subject matter expertise in both an external (client) and internal (knowledge management) capacity on multiple investment management domains
- IM vendor package expertise-the Senior Consultant will be responsible for evaluating and implementing third-party applications from the investment management vendor marketplace
- Technical expertise-coupled with advanced subject matter and delivery expertise, the Senior Consultant may possess advanced analytics skills leveraging SQL or equivalent toolsets, DBA skill, knowledge of operating systems or advanced knowledge of certain vendor applications
- Methodology expertise-the Senior Consultant will be involved in all levels of the project/software development lifecycle (requirements definition, project estimating, functional design, unit/integration testing and quality assurance) and will possess expert knowledge of multiple recognized SDLC methodologies
- Business process expertise-the Senior Consultant will possess advanced knowledge of process design methodologies while leverage subject matter expertise and experience in defining solutions to complex business issues or problems including documenting and reengineering business processes and streamlining operations and/or facilitating the evaluation
- Solutions expertise-The Senior Consultant will have expertise in the selection and implementation of supporting systems and tools to deliver results that exceed client expectations

Client Relationship Management:

- Partnering with client resources including operational users, business analysts, project managers, and operations personnel
- Participating in recurring client status update meetings and working sessions, potentially including senior management and executive-level meetings
- Establishing relationships with key senior client project resources

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

REQUIRED EXPERIENCE:

The Senior Consultant will have significant buy-side investment management and project management skills, and will be comfortable working with limited supervision in a fast-paced client environment with challenging deadlines and priorities.

A key aspect of the experience and skillset(s) required for this position is the demonstration of sustained and repeatable success in the buy-side investment management technology marketplace. The Senior Consultant position can be construed as equal parts business analyst, process improvement consultant, and industry expert in our niche space.

The required experience, professional skills, and personal skills required for the role include:

- Advanced knowledge of SDLC, process improvement, and transition management methodologies and tools
- Strong analytical and problem solving skills
- Ability to communicate clearly and effectively, both verbally and written
- Ability to deal with challenging, changing, and fast paced environments
- Strong time management skills and the ability to potentially work abnormal work schedules including significant travel
- Strong listening skill coupled with the desire to learn and advance

The candidate for this role should have extensive experience in primary delivery roles on projects in the investment management/financial services industries. It is expected that the individual will interact with client staff ranging from the functional VP's and line managers down to operations and technology staff, business analysts, and project managers. Based on the above, the professional experience required includes:

- Minimum of 8 years delivering investment management operations and technology projects; must include previous consulting and project management experience
- Demonstrated understanding of project management methodologies and their pragmatic utilization in the investment management marketplace
- Buy-side investment management knowledge including trading operations, data management, performance measurement, client reporting, compliance, investment accounting and client reporting
- Proven ability to participate in a Project Lead or SME role on engagements with limited supervision from Senior Management
- Ability to leverage knowledge or prior experience in the industry to synthesize findings and to develop and present alternatives and recommendations on a client engagement
- Demonstrated ability to work interactively in a client-facing manner with Citisoft clients; critical need to conduct client interviews to identify requirements and strengths/weaknesses in current processes
- Excellent interpersonal, written, and organizational skills

PERSONAL SKILLS:

It is expected that the Senior Consultant will display the personal maturity and self-confidence that this client-facing role requires. In his/her day-to-day delivery role, the individual will need to manage through inherent conflicts across numerous functional and reporting lines. Strong interpersonal skills are therefore critical for both Citisoft and the Senior Consultant role. At a minimum, those skills must include:

- Exemplary interpersonal skills and emotional intelligence
- Strong team player
- Loyal, dependable, and trustworthy
- 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.