



CONFLUENCE

Job Title: Professional Services Consultant - Business
FLSA Status: Full-Time/Exempt
Supervisor: Manager of Business Consulting

Date: September 1, 2009
Department: Professional Services
Job Code: PSC-09-001

Confluence is the global investment management industry's leading provider of automated data management solutions. Confluence helps investment management companies gain unprecedented control by automating the collection, creation, confirmation, and of delivery investment product data. The Confluence Unity™ platform addresses a wide range of problems—from performance measurement to customized reporting—for a full array of domestic and international products, including mutual funds, and variable products, hedge funds, and alternative investments.

Purpose

The Professional Services Consultant – Business is responsible for business process training and assistance to a variety of individuals at client sites. This person also serves as a key resource in the internal consulting and training of co-workers. This individual works with the project management office and client(s) to define project tasks/schedules and ensures that associated tasks are completed as planned with associated travel. The Professional Services Consultant – Business will report to the Team Lead.

Responsibilities

- Provide consulting services pre and post production to Confluence clients
- Assist in troubleshooting client issues
- Create statements of work, engagement reports, and related reference materials
- Work in a team with the Technical Consultant on client implementations
- Perform data analysis, data verification, system setup system and report testing, and training
- Act as a liaison between clients and company
- Identify opportunities for new business with existing clients
- Extensive travel may be required
- Other duties as assigned

Education and Work Experience

- Requires minimum of 3-5 years of Mutual Fund operations or portfolio management.
- Bachelor's degree in business or finance or equivalent experience
- Experience with performance or holding reporting a plus
- Professional field consulting experience
- Deploying enterprise software solutions preferred
- Excellent presentation skills
- Problem analysis and resolution at both a strategic and functional level



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- Excellent interpersonal and communications skills
- Crystal Reports experience a plus
- Database administration skills a plus
- Expertise with all Microsoft Office products—particularly Access and Excel

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To apply for this position, please send a cover letter (including job code) and resume.

**Attn: Human Resources
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