



CONFLUENCE

Job Title: Engagement Manager
FLSA Status: Full-Time/Exempt
Supervisor: Manager of Client Engagements

Date: March 29, 2010
Department: Professional Services
Job Code: PSC-10-003

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 Engagement Manager at Confluence works within the Professional Services department and is responsible for coordinating, planning, and managing software implementations. This person serves as the primary contact between a client and the implementation team. They ensure the final product delivered is of the highest quality and meets or exceeds client expectations. Additional responsibilities include mentoring co-workers. This individual works with the Implementation Team, the Project Management Office and clients to define project tasks/schedules and ensures that associated tasks are completed as planned. The Engagement Manager is expected to be an expert on client processes and Confluence processes.

Responsibilities

- Provide client management expertise from pre to post production for Confluence clients
- Create weekly engagement reports and related reference materials
- Assist in troubleshooting client issues
- Track and manage project budgets
- Manage project schedules
- Manage project issues logs
- Drive the risk management process
- Facilitate communication and negotiation within the team
- Remove roadblocks and barriers to task completion for the team
- Track progress and report project status
- Manage resource allocation
- Serve as liaison between technical and non-technical departments
- Communicate with management, developers, analysts, product managers and technical support specialists on product issues
- Some travel is required



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Education and Work Experience

- Mutual Fund back office operations (fund accounting, fund administration) experience strongly preferred
- Professional field consulting experience and deploying enterprise software solutions
- Previous Client Management experience
- Project Management experience
- Excellent presentation and training skills
- Problem analysis and resolution at both a strategic and functional level
- Excellent interpersonal and communication skills
- Crystal Reports experience a plus
- Expertise with all Microsoft Office products, particularly Access, Project, and Excel
- Bachelor's degree in business or related field
- Professional experience of 3 to 5 years in software implementations/client management with experience in Financial Services industry

Confluence Technologies Inc. is an Equal Opportunity Employer (EOE) and offers employment opportunities to all qualified persons regardless of race, color, religion, sex, age (40-70), national origin or ancestry, physical or mental disability (except where physical or mental abilities are a bona fide occupational requirement), veteran status, marital status, familial status, sexual orientation, HIV-positive status, possession of the sickle cell trait, genetic characteristics, political views, and any other basis protected by federal, state, or local laws.

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

**Attn: Human Resources
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