



CONFLUENCE

Job Title: Relationship Manager
FLSA Status: Full-Time/Exempt
Supervisor: Support Manager

Date: November 25, 2009
Department: Client Services
Job Code: CSS-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

Confluence's most important asset is its clients. The mission of the Customer Support team is to ensure that Confluence's clients are getting the business result they desire via our solutions. The Support team owns the client's satisfaction with our solutions. The Relationship Managers are responsible for all clients/products post-implementation.

Responsibilities

- Relationship Manager is responsible for the client's overall satisfaction with our solutions post-implementation.
 - Knowing the client
 - Offices-Products Purchased/Implemented
 - Key Contacts
 - Product Usage
 - Opportunities
 - Issues
 - Overall Satisfaction
- Managing the relationship
 - Resolve current issues
 - Deployment of custom work and/of deliverables
 - Management of the Service Release to include required product changes
 - Communicate issues to Technical Support/Development/E-services
 - Manage the clients expectations by communicate progress on issues as well as Confluence/Platform changes to client
 - Communicate opportunities to sales
 - Communicate the client's overall satisfaction and plan to resolve any major outstanding issues to management
 - Ensuring that all client opportunities and issues are resolved in a timely manner

Education and Work Experience

- Bachelor's degree in Business required
- Minimum of three years of Fund Accounting/Fund Administration experience
- High creativity with the ability to solve complex business problems
- Ability to learn independently and work with a high degree of autonomy
- Attention to detail and thoroughness
- Excellent written and verbal communication



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- Knowledge of all products, company policies, and practices

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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