



CONFLUENCE

Job Title: Professional Services Consultant - Technical **Date:** September 1, 2009
FLSA Status: Full-Time/Exempt **Department:** Professional Services
Supervisor: Manager of Technical Consulting **Job Code:** PSC-09-002

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 – Technical (PSC-T) participates in and facilitates all processes and customer interaction, from contract signing through conversion, installation, and full implementation of Confluence's technology solutions—including: data conversion and verification, enterprise application and multi-platform database deployment, system interface implementations, and reporting solutions design and creation. This individual works with the project management office and clients to define project tasks and schedules, and ensures that associated tasks are completed as planned. The PSC-T provides technical and 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, as well as mentoring other technologists. The Professional Services Consultant – Technical will report to the Manager of Technical Consulting.

Responsibilities

- Provide consulting services—pre and post production—to Confluence clients
- Deploy, configure, and perform client upgrades for Confluence solutions
- Assist in troubleshooting client issues
- Perform various database administration and data migration tasks
- Implement interfaces to clients' systems: e-mail applications, fax servers, data warehouses, etc.
- Analyze, design, and create reporting solutions for clients using Crystal Reports
- Conduct training for all Confluence products and third party products used by Confluence solutions
- Complete data verification process for client implementations
- Serve as an internal consulting resource for co-workers
- Identify opportunities for new business with existing clients
- Create and maintain reference documents for use through implementations
- Prepare for, manage, and document weekly status calls with clients to discuss outstanding items and project deadlines
- Work with Development staff to develop tools to aid client implementation



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- Participate in internal product testing
- Create statements of work, engagement reports, and related reference materials
- Some travel required for most implementation and consulting engagements
- Other duties as assigned

Education and Work Experience

- Bachelor's degree in Information Systems, Computer Science, or equivalent experience
- Strong database administration experience working with Microsoft SQL Server and Oracle; Solid skill sets in the following database administrative areas: SQL & PL/SQL queries and scripting, database creation, security/user management, backup/restore, performance tuning, data migration/transformation tools and techniques, and job scheduling
- Strong Crystal Reports experience
- Superior analytical and problem solving skills
- Solid administration and troubleshooting skills for all Windows Server products, including NT 4.0, 2000, Exchange 5.5/2000, IIS, and Terminal Services. Network administration experience is a plus.
- Strong experience with VBScript and XML
- Professional field consulting experience, conducting data conversions, and deploying enterprise software solutions preferred
- Professional database and network certifications are a plus
- Experience with mutual funds or the financial services industry is a plus
- Ability to comprehend Visual Basic and C# code is a plus

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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