



Position Description for Project Manager—Customer Operations

Approved Date: July 14, 2008 FLSA Status: Exempt
Revised Date: Salary Grade: NA
Location: Pasadena, CA
Typically Reports to: Director of Customer Operations

Summary

The Project Manager—Customer Operations will ensure the smooth implementation and customer satisfaction with the VantageILM solution at customer sites; including training, platform configuration, and data migration. The implementation process includes analyzing the customer business operations and offering best practices that are compatible with the VantageILM solution.

Essential Duties/Responsibilities

The Project Manager will manage multiple customer implementations simultaneously. Some projects may span multiple months and include highly technical components due to multiple system integrations and existing data migration. Travel to customer sites may be necessary. Responsibilities include:

External

- Serve as the primary liaison with our customers during implementation process
- Analyze existing customer processes and assist them employing best practices when implementing the VantageILM platform
- Configure software platform according to customer requirements
- Manage all aspects of software implementation projects including estimating resource needs, resource/scheduling allocation and management of technical staff assigned to the project execution, customer issues tracking, technical problem resolution, development of specifications and management of project communications
- Build customer confidence in the platform and establish an ongoing long-term partnership with the customer's management team
- Coordinating the configuration and training initiatives for the customer
- Ongoing customer contact and support to ensure complete customer satisfaction
- Report project progress, including deliverables, significant milestones, risks and mitigation strategies, to both customers and the management team

Internal

- Communicate and coordinate activities among various company departments and customer resources
- Optimizing the implementation process for use on future projects
- Provide ongoing feedback to the development team of new features or changes to the solution
- Assist with development and modification of documentation as needed

Attitude

- Willing to apply information technology and business acumen to a new challenge with a fast paced, entrepreneurial spirited team
- Is highly motivated to make the company a leader in the industry
- Committed to be a customer advocate while presenting the company favorably
- Self-sufficient and willing to go the extra mile to solve a problem
- Has a high level of comfort working in a rapidly changing, fast-paced startup environment

Level of Supervision

None

Education/Licensing/Experience Requirements

Education and/or Experience

- BA degree in business, computer science or technical discipline (Masters preferred)
- Basic accounting/finance knowledge (Financial lending industry experience is a plus)
- 3+ years experience in consulting or investment banking or business analysis
- Proven track record implementing highly complex software for non-technical users successfully
- Advanced math coursework or related financial analysis work experience
- Strong Knowledge of Microsoft Windows, SQL Server and Office products

Certificates, Licenses, Registrations

- PMP certification is desirable

Knowledge and Skills

- Strong interpersonal and communication skills
- Attention to detail and organization
- Mastery of English with strong verbal and written skills are a necessity
- Project Management experience a plus
- Knowledge of principles and processes for providing customer and personal services. This would include customer needs assessments, meeting quality standards for services, and evaluation of customer satisfaction.

Travel Requirements

Up to 25%

Physical Requirements

While performing the duties of this job, the employee is frequently required to stand; walk and sit. The employee must occasionally lift and/or move up to 25 pounds

Decision Making Responsibilities

The project manager is a facilitator and should have a strong ability to influence both internal employees and external customers to complete their assigned tasks on time in a successful manner.