

Position Description

Job title:	Implementations Consultant
Reports to:	Consulting Manager
Positions reporting to this role:	Nil

Role

Provide technical and management consulting services to Class users with the implementation and rollout of Class within their organisation and with the rollout of Class functionality to their related parties including planners, investors and auditors.

Responsibilities

Implementation Consulting

- Build trust, communicate effectively and drive engagement with the customer.
- Communicate value proposition of using the Class system and following the Class implementation process to clients.
- Follow plan, execute and track activities against an agreed implementation plan and ensure that prospective clients are fully implementing the Class system in their business and embracing the change management required within their operations.
- Assist the client through the “first 60/90 day” implementation plan including planning for user access, training, fund transitions, data feed activations and business policy settings.
- Conduct spot reviews of the client’s funds, training attendance and user activity to ensure the client is optimising the system capabilities.
- Provide direction to accountants and administrators with the timely collation of data and documentation required for transitioning their funds.
- Drive engagement with clients to meet process milestones including client contractual agreements.
- Help Accountants and administrators with business related queries and the resolution of day to day issues in adopting the Class software.
- Troubleshoot and solve problems, assist clients with raising, tracking and escalating support issues identified during the implementation process.
- Deliver one-on-one training and technical support. This will include on-site meetings where applicable.

- At key milestones including, prior to hand-over to Support, perform telephone interviews with the clients to get feedback on the on-boarding experiences including transitions, account management and support services.

Implementation Planning and Continuous Process Improvement

- Provide consulting support to clients across the entire on-boarding process:
 - trialling,
 - contract issuing and
 - the “first 60/90 days” of a new client implementation
- Ensure the CRM is updated and ensure process check-points and statuses are completed by the appropriate party at each stage of the on-boarding process.
- Gather information to define Best practises and assist clients in adopting best practise principles for administration on the Class systems.
- Update and refine the Implementation Plan to ensure that it continues to provide a roadmap for the success of new client implementations including areas such as system configuration, user access setup, user training, transitions etc.
- Proactively establish and maintain effective working team relationships with Sales, Product Management and other areas of the business.

Account Management Assistance

- Provide the respective RCM (Regional Client Manager) with ongoing updates as to the clients' progress during implementation.
- Identify clients at risk of not implementing successfully and engaged the client's RCM in resolution and case management.

Product and Marketing Support

- Liaise with product manager and key stakeholders on client requirements and enhancements related to the entire on-boarding process
- Work with Transitions Team to capture and compile Implementation ‘most wanted items’.
- Assist the product team in developing a communication plan to advocate best practise.
- In conjunction with Sales, Marketing and Product Management teams, participate in periodic road shows to Class clients in major centres, providing technical product updates/ best practise demonstrations.

Key Performance Indicators

Colleague satisfaction as assessed by your manager, peers and associated project and support staff – note this assessment may be performed either informally by interview or formally via survey subject to the applicable management processes in place at that time. The assessment will include:

- How effectively you execute the above responsibilities (includes pro-activeness, responsiveness and thoroughness)
- How professionally you interact and communicate with your colleagues (and clients if applicable)