

Implementation Consultant

Why is this role a big deal?

This is a great opportunity to join the Time4Advice (T4A) Client Engagement team and develop your career in software implementation and project management.

If you don't already know, we're on a mission to disrupt the financial advice and wealth management technology market and become the leading FinTech provider within the industry. Working within the Client Engagement team, you will have a direct impact on us achieving our ambition.

Role Purpose

As a key member of the Client Engagement team, your primary purpose will be to implement CURO:

- for new clients secured by the Sales and Marketing team
- as part of the acquisition process for our high growth clients
- for existing clients to transition them to CURO on Power Platform.

For larger clients you will be required to elicit client specific objectives as part of the detailed CURO Discovery stage, gaining a full insight of requirements before collating them into a comprehensive report to present your findings. To achieve this, you will utilise expertise across T4A to advise how each of the objectives can be met together with the estimated cost.

You will then use your expertise of the industry and CURO, together with your excellent people skills to project manage all aspects of delivery successfully, within time and budget.

What will the role entail?

Once Discovery is complete you will either work with the Sales and Marketing team to ensure you have a full insight of requirements for the client, or gather the information from your own Discovery exercise and consider how each of the objectives will be met in project terms.

Having discussed these objectives with the client, you will prioritise and plan the project delivery, including successful data migration and the identification of training and reporting needs, plus any specific development and personalisation identified. You may also need to conduct assessments of current project capacities and timelines.

Following the documented implementation process, you will work with your colleagues and closely with the client to support the first phase of their journey implementing CURO. Performing the implementation planning and setup activities for the project will involve regular project calls and excellent communication skills to navigate the individuals through the change curve and out the other side into their brave new world. You will help them to see the benefits of CURO during this period and have the tenacity and leadership to drive their projects forward with them.

During the implementation you will provide consultative training to support the client's self-service learning. This will entail regular review of the learning material and consultation with the client to ensure CURO is set-up appropriately with relevant areas of the software fully understood.

Where this is lacking you will provide consultative training and or recommend additional dedicated training, dependent on the subject area.

Where possible, you will implement CURO's inbuilt process and document automation to get the client started. Where more custom automation is required, you will work closely with the T4A Technology Consultants to deliver to the required specification. You will also ensure all third-party integrations are identified, configured, and tested in accordance with the stated objectives.

You will ensure all record keeping for the project, both client facing and internal, is always kept up to date. You will need to adhere to the CURO implementation framework for each implementation and provide project insights to other team members during the project lifecycle.

You will need excellent project management and communication skills, a deep understanding of data for migration purposes and a genuine passion for technology and CRM, in addition to being supremely organised. A high level of drive and commitment will be essential.

This is an outward facing role which will challenge your technical, presentation and communication skills. Contribution to the overall implementation strategy and process including the provision of consultancy and training, will also form an important part of this role.

Required Skills and Experience

- Previous operational or advisory experience in the financial services industry
- Experience of project managing multiple / large complex technical projects
- Demonstrable experience in requirements capture
- Experience of a consultative nature
- Experience of running meetings and workshops with key stakeholders
- The ability to multi-task and remain calm under pressure
- Excellent presentation skills
- Excellent communication skills essential
- Excellent relationship skills essential
- Excellent organisational skills essential
- Excellent computer skills and knowledge of Office 365
- Ability to work independently as well as part of a team

Beneficial Skills and Experience

- Knowledge of / experience of working with Dynamics 365
- Problem solving under pressure
- Experience of / qualifications in software training
- Full, clean driving licence
- Willing to work anywhere in the UK and to stay away from home when required

This is not an exhaustive list, and you are required to be flexible in your approach to carrying out your duties that may change from time to time to reflect changes in the Company's circumstances. The Company therefore reserves the right to vary the job description in consultation with you.