

## **Solution Delivery Manager, Customer Success**

FinLocker is a Customer centric leading financial data and analytics company. Our mission is to enable people to achieve the dream of Homeownership and Financial Well-Being. Our Consumer Digital Assistant is a secure, transactional personal financial management tool that aggregates a consumer's financial data and analyzes/recommends/streamlines mortgage and other financial transactions. Consumers benefit from personalized recommendations, financial/mortgage education, credit score/report/monitoring, cash flow analysis, budgeting, goal planning, data sharing and more. Lenders utilize FinLocker to generate leads, cross-sell value add products, reduce costs, and create Customers for life.

FinLocker is looking for a strong Customer Solution Delivery Manager to deliver Customer Success outcomes through the delivery of timely implementations of FinLocker solutions for our Customers and Partners. The position is based in our Clayton (St. Louis) office.

The ideal candidate is a servant leader who puts Customers first and has a passion for their success, has good communication skills, is detail oriented, and has a can-do mindset to deliver Customer Success solutions.

### ***Successful team members in this role:***

- Enjoy being a trusted advocate and working with Customers to deliver Customer success and better than expected business outcomes
- Create and deliver timely joint Customer and FinLocker project solution outcomes including establishing upfront goals, planning and on-time delivery
- Effectively communicate with all levels of Customers and FinLocker leadership including executives, business champions, Customer users, and Technology team members.
- Proactively identify potential obstacles and roadblocks and develop mitigation plans to reduce risk and ensure Customer satisfaction
- Define and utilize standard practices and process improvements to streamline and scale the implementation of FinLocker solutions
- Grow team members and demonstrate exceptional teamwork and partnering

### ***Responsibilities / Required Experience***

- Proven track record of managing Customer implementations of software solution projects including planning, communication, and delivery of Customer solution results for based services contracted
- Exceptional Customer relationship and Customer management abilities including holding regular meetings with all stakeholders to ensure open communications, track progress, and identify potential risks and mitigations
- Open and accurate communication and reporting of Customer and Partner solutions to FinLocker leadership including weekly status using Customer metric data and project milestones.
- Capture, prioritize and plan cross-Customer solution and integration needs to optimize cross-Customer synergies while balancing FinLocker development capacity
- Create customized implementation plans for Strategic Customers and Partners.
- Proactive identification and escalation of risks and creation mitigations plans to minimize the impacts

- Implementation of B2B SaaS technologies for contract clients and their Customers including working with cross-team FinLocker technical delivery teams to deliver timely solutions.
- Strong understanding of software technology and agile product delivery
- Strong written and oral communication and presentations skills including the creation of best practice documentation.

## **Education**

- Bachelor's degree in BA or BS Management Information Systems, Computer Science, or other

## **Related Work Experience**

- At least 5 years project management experience
- At least 5 years in a Customer facing implementation roles
- Experience at a large IT consulting firm is preferred
- Financial and/or mortgage industry experience is strong plus
- Proven track record implementing software solutions for external Customers is preferred

## **Certifications.**

- PMP – Certified Project Manager is required