

POSITION DATA		Version 1.0	
JOB TITLE	Senior Consultant	FLSA Status	Exempt
DATE	November 2023	REPORTS TO	Manager iMIS Consultants
LOCATION	Remote	SUPERVISORY ROLE?	No

POSITION SUMMARY

The **Senior Consultant** at CSI is a highly skilled consultant demonstrating leadership and flexibility who can build rapport with clients, team members, managers, and senior executives in a consulting context. The Senior Consultant is knowledgeable in several disciplines including but not limited to: Software Systems Implementation, Project and Program Management, Client Relationship Management, Business Process Improvement, Change Management, Client Financial Management, and Coaching and Mentoring other consultants.

The Senior Consultant partners with and ensures long-term success for an assigned portfolio of CSI clients (valued at \$500k+ in annual revenue to CSI) and is responsible for developing and sustaining strategic relationships with business and technology executives within those clients. The Senior Consultant liaises between clients, 3rd parties, and CSI's cross-functional internal teams to deliver sustainable solutions to Associations, Non-Profits, and Chapter-based organizations. A Senior Consultant is a functional expert in the iMIS platform as well as CSI's portfolio of proprietary add-on software, enabling the Senior Consultant to provide innovative, value-added solutions for CSI's clients. The Senior Consultant works across multiple disciplines and industries and understands their clients' businesses and builds credibility quickly.

The Senior Consultant also serves in a pre-sales and marketing capacity at CSI. The Senior Consultant is often pulled into strategic pursuits as a Subject Matter Expert and participates in the strategic pursuit through to closure. The Senior Consultant will also be expected to give client presentations, conference presentations, as well as contribute to CSI's proprietary thought leadership working with CSI's Marketing department.

PRIMARY ROLES & RESPONSIBILITIES

- Understand the client's business challenges to design effective solutions that address the people, process, technology, and data needs of our clients to achieve their desired outcomes.
- Elevate, deepen, and broaden relationships within each Client and maintain a thorough and up to date understanding of their business and goals.
- Large or complex project execution or multi-project execution with a focus on exemplary quality assurance, excellent client relationships and demonstrated thought leadership.
- Manage a portfolio of clients valued at over \$500K in annual revenue for CSI.
- Collaborate with Client Success Managers on account plans for your accounts, including operational, strategic, and growth goals.
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- Manage client expectations and ensure consensus on key decisions among all stakeholders.
- Conduct regular client meetings with your assigned clients.
- Design and conduct assessments, evaluate results, and present findings in an easy-to-understand manner.
- Identify potential people-side risks and anticipated points of resistance and develop specific plans to mitigate or address concerns.
- Stay current with industry, technology, and other trends in the marketplace, and conceive strategies to incorporate these insights into CSI's future business plans.
- Cultivate innovation by creating new and better ways for CSI and its clients to be successful.

- Leadership of Consultants and Analysts including coaching, mentoring, and subject matter expertise.
- Lead brainstorming sessions and client meetings, ensuring smooth project workflow.
- Manage project scope and bring in subject-matter-experts when needed.
- Assist with high severity requests or issue escalations as needed.
- Monitor progress of deliverables against budget and timelines.
- Maintain a flexible, positive attitude when troubleshooting client issues.
- Be a self-starter, help others, pitch in, contribute.

SKILLS & ABILITIES

- Ability to interact professionally with a diverse stakeholder group and build long lasting trusted advisory relationships including executives, managers, and subject matter experts.
- Experience in managing project budgets, forecasts, and resource management.
- Business analysis and requirements definition.
- Business process discovery, evaluation, and re-engineering.
- Stakeholder expectations management across large-scale programs.
- IT systems implementation.
- Data strategy and governance framework creation.
- Experience working with or for associations and/or non-profits.
- Great interpersonal, communication, organization and time management skills.
- A genuine interest and passion for learning and using technology, so that passion is visible to the team.
- Experience working with iMIS, AMS platforms, or other SaaS Software models.
- SQL, Crystal Report, and SSRS report knowledge are a plus.
- Experience in full lifecycle delivery using agile or traditional waterfall methodology, or both.
- Outstanding verbal and written communication skills with audiences of all levels. Including strong presentation development and delivery as well as business and technical writing.

QUALIFICATIONS	
REQUIRED EDUCATION LEVEL:	Bachelor’s Degree or equivalent work experience.
AREA OF STUDY / DEGREE:	N/A
CERTIFICATIONS (REQUIRED OR PREFERRED)	N/A
MINIMUM TOTAL WORK EXPERIENCE	Minimum of 7 Years of total work experience
MINIMUM SPECIALIZED WORK EXPERIENCE	Minimum of 3 years of Consulting and/or Account Management experience