Operations Manager, Data Stewardship & Clarity 22c-2 Services

SalesPage Technologies / Kalamazoo MI, Milwaukee WI, or Remote

The Operations Manager is responsible for leading the successful delivery of services (Data Stewardship and Clarity) to our clients. These services are complex in nature and will constantly evolve with new market demands. The successful candidate will lead the internal SalesPage team in delivering these services with excellence. This is measured by multiple facets, most notably high-quality services, on time and on spec deliverables, fantastic client support in a repeatable fashion. An excellent client experience is a keystone of our service offerings. Strong collaboration, problem-solving, and communication skills are an absolute requirement for this position.

Job Requirements and Responsibilities

- Perform and manage the operational services across a team to deliver the Data Stewardship service offering:
    - Manage client assignments, employee workloads across the Data Stewardship team. Ensure assignments are appropriate to meet service level standards.
    - Have full understanding of the user interface – how to use the interface and what purpose each component serves.
    - Manage the client support Helpdesk to ensure inquiries are resolved within stated timeframes. Ability to research and respond to second level support tickets that are of complex nature.
    - Analyze and interpret data projects/efforts. Decide on best-methods for processing the data (i.e. systematic, manual, time estimates, mapping approaches, completion plan).
    - Successfully defend decisions made in efforts to produce the best deliverable possible (avoiding duplicates, accurate linking, etc.).
- Perform and manage the operational services to deliver and support Clarity Compliance, an SEC Rule 22c-2 monitoring and service offering:
    - Qualify and establish new intermediaries as needed
        - Client implementation management, including initial & ongoing training
        - Provide and manage ongoing customer support
        - Review internal audit reports – identify and resolve issues
        - Project Management
        - Manage Non-NSCC requests/response process (1 direct report), including relationships with intermediaries
        - Accounting

- Oversee and lead new client onboardings and ongoing steady-state delivery of services:
  - Lead regular team meetings to track Implementations, Projects and facilitate collaboration among team members.
  - Create JIRA tickets to accurately track deliverable scope details, status and facilitate workflow.
  - Lead the team to continuously improve the service deliverables.
  - Make decisions and remove bottlenecks to help the team complete the deliverables. Work with the Operations Director to create guiding principles that can be referenced for help in the decision-making process.
  - Immediately escalate problems or issues to executive management and track until resolved.
  - Determine estimates (hours) of work for Implementations/Projects.
  - Ensure Implementations/projects are on time and to spec.
  - Update resource plan on weekly basis.
- Team Management
  - Onboard new team members with training program, adjusting as product changes.
  - Create ongoing development opportunities for team members.
  - Maintain individual and group status meetings with team members.
  - Track team hours and manage stewardship payroll budget. Track and approve out-of-office and paid-time-off requests.
- Evaluate business processes, work with Operations Director to uncover areas for improvement to maximize efficiency and accuracy.
- Create guiding principles for treatment of dev work (i.e. minor adjustments to meet client deliverables vs. big rocks to improve the service deliverables as a whole).
- Create and maintain workflow process, policies, and standards. Ensure compliance from all team members.
- Create and maintain status report on service volumes and efficiencies. Regularly send to executive management and other parties as necessary.
- Create and maintain processes to monitor, track, alert and report on Service Level Agreements (SLA's).
- Collaborate with Sales to provide input on contract agreements to clearly specify the scope, constraints, assumptions, schedule, cost, and governance to best protect SalesPage. Ensure SalesPage is delivering to what is stated in the contract.

Job Qualifications

- Bachelor's degree in business or a related field.

- At least 5 years of post-collegiate experience in Transfer Agent operations.

- Hands on experience with mutual fund data stewardship/data mapping.

- Prior experience in compliance related to SEC Rule 22c-2 (requested, not required)

- Advanced knowledge of Transfer agent, intermediary and clearing firm data.

- Advanced Excel Skills.

- Ability to analyze large volumes of data.

- Excellent written and verbal communication, presentation and relationship skills.

- Strong attention to detail, critical thinking skills, and troubleshooting skills.

- Highly organized, with ability to prioritize work when working on multiple projects with tight deadlines.

- Ability to work independently, with little direct supervision. Must be a self-starter.

- Ability to manage remote employees.

- Able to handle multiple projects at the same time and prioritize work to meet established deadlines.

- Excellent understanding of the SalesPage SalesStation product suite and of the Asset Management industry.

About SalesPage

SalesPage provides solutions for asset managers focusing on data collection, management, aggregation, and analysis as well as industry specific CRM capability. SalesPage functions as a hub within our client's data architecture, serving as a center point where data is collected and distributed to other systems, such as BI platforms and Salesforce. We help asset managers enter the world of "big data" to find the best way to connect their investment products to those who will benefit from them most.

For over 30 years, SalesPage has been working with some of the largest and most respected asset managers in the industry to solve business challenges with industry leading software solutions. We are headquartered in downtown Kalamazoo, MI, in a state-of-the-art facility for tech companies, with a satellite office in Milwaukee, WI, and remote employees across the nation. We are looking for intelligent and passionate individuals to join our team and help continue our advancement towards being the most respected and in-demand distribution management partner in the industry.

SalesPage is an equal opportunity employer (EEO) that does not discriminate on the basis of actual or perceived race, creed, color, religion, alienage or national origin, ancestry, citizenship status, age, disability or handicap, sex, marital status, military status, sexual orientation, gender identity or expression, genetic information, arrest record, or any other characteristic protected by applicable federal, state or local laws. Our management team is dedicated to this policy with respect to recruitment, hiring, placement, promotion, transfer, training, compensation, benefits, employee activities and general treatment during employment. However, we are not able to sponsor visas.