

# **Job Description**

**Role:** **Job Description**

**Reporting To:** Head of Professional Services

**Location**: Reading, UK

**About Us:** Launched in 2010 by a successful team of entrepreneurs, Workbooks.com has rapidly become one of the fastest growing providers of web-based CRM, Marketing Automation and Business Applications.

Our suite of cloud based applications are specifically designed for mid-size organisations helping them grow their revenues, streamline business processes and reduce operational costs.

Our customer base spans many industry sectors including Professional Services, Not-for-profit organisations, IT & Telecommunications, Transport & Logistics and Manufacturing. We pride ourselves on providing outstanding levels of customer commitment and customer service to all our customers.

**Role Overview**

Workbooks Engagement Managers seek to understand our customer’s needs, their business, how success is defined, and ensure that we are exceeding expectations in delivery and developing valued solutions. Engagement Managers lead individuals, teams or multiple groups and play an active role in analysing project goals, creating a plan to achieve those goals, and then driving the Workbooks team members, customer Stakeholders/SMEs and potentially other third parties to achieve those goals while understanding the client environment and any limitations to execution.  
  
More specifically, they are responsible for managing scope, schedule, and cost across one or more Client implementations. The ideal candidate will have a proven track record of leading deployments of Enterprise Software Solutions in a client environment, with a passion for delivering real business value to customers. Our Engagement Managers leverage Workbooks’ delivery methodology to successfully navigate a CRM Deployment, managing the full systems development lifecycle from requirements gathering through configuration and data migration, testing and Go-Live. Engagement Managers must leverage their management and leadership capabilities to successfully deliver to their team(s) plan, proactively identify and manage risks, resolve issues and escalate where appropriate to drive projects to successful completion, while exceeding customer expectations.

**Responsibilities:**

* Lead consulting engagements from pre-sales stage to successful delivery of the project in terms of scope, deliverables, budget, client satisfaction, and achievement of required business outcomes
* Manage all aspects of project delivery and solution delivery, leading and managing the workbooks implementation team.
* Oversee configuration, delivery, testing, training and ultimately client acceptance of Workbooks solutions.
* Define and own any corrective action plans and escalations in the event of any deviation from the project scope and plan.
* Provide management information on the project to the client, in line with Workbooks governance standards. This will include, but is not limited to: financial reports, status reports, work plans, issue lists, agreed actions, risk notification, impact resolution plans, decision lists, lessons learned reports, follow on action recommendations and project closure project report. Suggest enhancements to these, as appropriate.
* Manage the project deliverables to ensure that they remain in scope of the statement of work, and where deliverables fall out of scope to use the agreed change control procedures.
* Escalate issues to appropriate levels of management within Workbooks and the client
* Establish and maintain a project repository and all associated documentation and deliverables
* Maintain a reasonable familiarity with the markets that Workbooks services and knowledge of the Workbooks functionality and service offerings. Hands-on configuration and demonstrations to clients may be involved.
* Develop best practices, reusable toolkits and templates for efficient and effective project delivery
* Ensure all time and expenses are submitted in accordance with Workbooks Policies.
* Perform additional duties as reasonably requested by your Manager.
* Identify opportunities to provide additional value to our clients
* Drive the continuous improvements of our implementation methodology and service offerings based on client experiences
* Work with our sales team in a pre-sales capacity to help shape and define scope and estimates for PS Customer Engagements.
* Help our customers to clearly define their requirements through needs analysis and business process reviews.
* Monitor on-site and remote day-to-day activities between the clients and Workbooks personnel.
* Interact with Marketing, Sales, Engineering, Support, implementation partners and Professional Services colleagues to ensure continuity and alignment between the organizations on any client project.
* Travel will be required. This will vary per client at an average rate of approximately 25 to 30%.

### Basic Qualifications

* 10+ years Project Management / Engagement Management consulting experience managing Mid to enterprise level IT projects across multiple industries
* 3+ years’ experience working in Professional Services or Consulting Firm Environment
* Leadership experience managing technical projects consisting of 5 to 12 people totaling over $500,000 budget
* Bachelor Degree or equivalent experience

### Preferred Qualifications

* 5+ years of experience leading the deployment of SAAS Software (ideally CRM related) solutions in client environments
* Experience with one or more of the following platforms is desirable: Salesforce.com, NetSuite, Microsoft Dynamics or SAP Business by Design.
* PMP/PRINCE2 Certification a plus
* Scrum Master Certification a plus
* Understanding of technology principles and services including infrastructure, business applications, data management, security, application platforms and consumer facing technology

## **Desired Experience and Skills:**

* Ability to take ownership, work under pressure and meet deadlines on time
* Works effectively in a dynamic environment with changing priorities
* Excellent presentation, communication (oral & written), and relationship building skills, across all levels of management
* Business financial and business case development acumen
* Excellent people management skills, including the ability to influence, negotiate and achieve results through others who are not direct reports
* Demonstrates the ability to understand the operating styles of others as well as team/client relationships, team dynamics, and adjusts behaviour accordingly to succeed. Recognizes environmental or cultural nuances and adapts.
* Ability to challenge, recommend and redirect teams as well as client expectations as necessary for successful program and project delivery.
* Actively looks for ways to improve process efficiencies and effectiveness.
* Takes proactive steps to ensure teams meet or exceed customer expectations.
* Ability to demonstrate experience to successfully manage two or more concurrent projects/customers.
* Experience managing projects using Waterfall, Iterative and Agile methodologies.
* Familiarity with SaaS and/or ASP deployments and its supporting architecture
* Excellent communication skills (both written and verbal) with strong presentation and facilitation skills (proficiency in Excel, Visio, Word and PowerPoint)
* Demonstrated ability to influence and consult (providing options with pros, cons and risks) while providing thought leadership to sponsors/stakeholders in solving governance, program/project management, business process and/or technical problems
* Strong interpersonal skills; customer-centric attitude; ability to deal with cultural diversity
* Proven team player and team builder
* Strong organisational and analytical skills