



Example of Implementation Lead Job Description

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Our company is growing rapidly and is searching for experienced candidates for the position of implementation lead. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for implementation lead

- Ensures that goals and deadlines are met and that workloads remain balanced, including continuous review of staff workloads
- Performs conference calls and consults on new and transfer plans with various client contacts including the regional sales directors, client relationship managers, plan sponsors, financial advisers, third party administrators and prior record keepers
- Oversees implementation process Works with internal and external clients to provide quality assurance
- Facilitates transfer of plan assets and records by written and verbal contact with prior provider and appropriate client contacts
- Lead successful implementations, meeting timelines and budget requirements
- Coordinates and prioritizes implementation tasks, manages timelines, maintains plans and communicates status to Engagement Managers, Senior Management and Clients as needed
- Ensuring the project is implemented within contractual obligations and regulatory requirements
- Manage multiple client projects at one time
- This role is responsible for scope management, change management, estimating impacts of scope change (timeline and cost) managing project resources
- Responsible for detecting potential issues and implementing solutions when

Qualifications for implementation lead

- Strong people skills with proven abilities to manage staff and cross-functional teams
- Required Series 99 license
- Experience with any of Market Data vendors and/or the Vendor Management process
- Experience in working with procurement teams and their processes
- Industry knowledge of data, with a specific focus on asset data (reference, characteristic and pricing)
- Industry knowledge of Fixed Income and/or Equities, although Derivatives, Alternatives, or Index experience a plus