



Position Description

Job Title: Kualifinancial Consultant
Department: Professional Services
Reports To: Jennifer LeBlanc

Position Summary:

The Kualifinancial Consultant plays a key role on the Services team by working directly with clients to ensure the smooth implementation and long-term success of the Kualifinance System (KFS) at their institutions. The incumbent works with other rSmart colleagues, including project managers and programming and technical staff, to execute a series of onsite and remote engagements that result in the successful deployment of KFS as an enterprise system. This individual provides analysis, consultation, and configuration recommendations prior to and during implementation; prepares and conducts hands-on systems training for each client's finance implementation team; and provides ongoing consultation regarding system administration, policy, and procedural matters. The incumbent also provides input into rSmart's strategic planning process and may periodically provide expert advice regarding add-on service opportunities and otherwise support the sales team. This position requires a strong functional understanding of the KFS and financial administration in higher education; outstanding assessment, problem-solving, and communication skills; and the ability to manage client expectations while forging a strong bond based on commitment and trust. Well-developed leadership and collaboration skills are also critical.

Primary Duties and Responsibilities:

- Collaborate with peers, product developers, open source communities, and project/account managers to support both standard and custom implementations.
- Analyze each client's functional requirements; prepare recommendations on optimal functional configuration to suit the institution's needs.
- Perform fit/gap analysis with regard to system functionality; document findings and propose workarounds.
- Deliver formal hands-on KFS training to system administrators and Finance Office end users.
- Provide ongoing consultation regarding system administration, use of the KFS, and policy and procedural matters.



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- Prepare for and conduct on-site and remote client consulting engagements as needed to perform duties noted above.
- Regularly solicit feedback from customers to improve client service and shares that feedback internally.
- Maintain a working knowledge of current releases (version changes and enhancements) of KFS.

Secondary Duties:

- Contribute to the composition and maintenance of KFS documentation and learning materials by providing content, review, and feedback.
- Use issue analysis and resolution experiences to add to rSmart's repositories of knowledge by creating and maintaining knowledge base articles for customers and by documenting issue resolutions internally to improve the effectiveness of the rSmart team.
- Respond to client inquiries regarding errors, problems, and questions on the use of the KFS.
- Advise clients on best practices for accomplishing their particular objectives within the product's framework.
- Provide expert advice to the sales team regarding add-on service opportunities and other sales activities.
- Promote interaction among clients by leading and monitoring online discussion groups, user meetings, etc.
- Submit and deliver conference presentations on topics important to rSmart.
- Mentor and provide functional training to colleagues and new hires.
- Participate in interdepartmental meetings, teams, and projects.

Competencies:

To perform the job successfully, an individual should demonstrate the following competencies.

Functional knowledge - Possesses a strong functional understanding of the Quali Finance System and related financial services and accounting processes.

Analytical ability – Skilled at needs analysis; synthesizes complex and diverse information; uses intuition and experience as well as data.

Problem solving - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; demonstrates attention to detail; develops realistic alternative solutions; works well in group problem-solving situations; uses reason even when dealing with emotional topics.



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Judgment - Willingly makes decisions in a timely fashion; exhibits sound and accurate judgment; able to support and explain reasoning for decisions; includes appropriate people in decision-making processes.

Planning/organizing - Prioritizes and plans work activities appropriately with minimal supervision; uses time efficiently; sets goals and objectives; develops realistic action plans.

Project management – Develops plans; provides reliable estimates of time and work to project manager; communicates changes and progress in a timely manner; completes projects and tasks on time, to specification, and within budget; coordinates own work with that of other team members; works well under deadline pressure.

Change management – Skilled at assessing processes, recommending appropriate changes, and mentoring others to effect process changes; develops workable implementation plans; communicates changes effectively.

Quality management - Demonstrates accuracy, thoroughness, and attention to detail; looks for ways to improve and promote quality; solicits customer feedback to improve service; applies feedback to improve performance; monitors own work to ensure quality.

Business acumen - Understands business implications of decisions; displays orientation to profitability; looks for win-win solutions.

Cost consciousness - Works within approved budget; develops and implements cost-saving measures; contributes to profits and revenue; conserves organizational resources.

Leadership - Exhibits confidence in self and others; inspires and motivates others to perform well; accepts feedback from others graciously; gives appropriate recognition to others; optimistic; inspires respect and trust.

Oral communication - Speaks clearly and persuasively in both positive and negative situations; listens attentively and requests clarification as needed; responds appropriately to questions; possesses effective group presentation skills; participates constructively in meetings.

Written communication - Organizes and presents ideas, concepts, explanations, instructions, and recommendations in writing clearly, concisely, and accurately; uses proper English grammar, punctuation, sentence structure, and spelling; presents numerical data effectively.

Interpersonal skills - Maintains confidentiality; listens to others without interrupting; keeps emotions under control; remains open to others' ideas and tries new things; focuses on resolving conflict rather than blaming; personable and friendly.

Dependability - Takes responsibility for own actions and works well independently; keeps commitments; commits to long hours of work when necessary to reach goals; completes tasks on time or notifies appropriate person with an alternate plan.



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Adaptability - Manages competing demands and works on multiple tasks concurrently.

Innovation - Displays original thinking and generates creative solutions; meets challenges with resourcefulness.

Teamwork - Interested in participating in and furthering the open source development model; balances team and individual responsibilities; gives and welcomes feedback; contributes to building a positive team spirit; puts success of team above own interests; builds morale and collaborates to achieve the group's goals and objectives; supports others' efforts to succeed.

Motivation - Sets and achieves challenging goals.

Initiative - Volunteers readily; seeks increased responsibilities; asks for and offers help when needed.

Quantity - Meets productivity standards; works quickly.

Professionalism - Approaches others in a tactful manner; reacts gracefully under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments.

Diversity - Demonstrates knowledge of EEO policy; shows respect and sensitivity for cultural differences; educates others on the value of diversity; promotes a harassment-free environment.

Ethics - Treats people with respect; keeps commitments; inspires the trust of others; works ethically and with integrity; upholds organizational values.

Organizational support - Follows policies and procedures; completes administrative tasks correctly and on time; supports organizational goals and values.

Safety and security - Observes safety and security procedures; reports potentially unsafe conditions; uses equipment and materials properly.

Attendance/punctuality - Is consistently at work and on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time.

Education and/or Experience: Bachelor's degree preferred; minimum of Associates Degree with 1-2 years' related experience and/or training.

At least 2 years' experience working in financial services in higher education or a related field. Comprehensive knowledge of accounting principles and reporting requirements for higher education of FASB, GASB, AICPA and NACUBO. Strong background in the business operations of higher education including general accounting, accounts payable, purchasing, grants and contracts, endowment, fixed assets, and accounts receivable. Experience in two or more of these areas is a plus.



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Experience in consulting/training groups or individuals in the use of computers and related technologies.

Physical Demands: While performing the duties of this job, the employee is frequently required to read text on a computer screen and in hard copy, stand or sit, talk, and hear. The employee is frequently required to enter information into computers via a keyboard or other peripheral device. (The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.)

Work Environment: While performing the duties of this job, the employee is expected to be able to work in a standard non-smoking office environment with other people (who may or may not wear scent), computers, and other office equipment close by. The noise level in the work environment is usually moderate. (The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.)

Travel: While performing the duties of this job, the employee is expected to travel about 25 percent of the time, but can be up to 50 percent at peak times. Domestic travel is common. International travel may be required from time to time.