

Employer: IMTC

Title: Client Success Manager (Full-Time)

Location: Hybrid, offices in New York, NY (Manhattan)

The Company

IMTC is an NYC-based, venture-backed FinTech company, creating innovative technology solutions for fixed income professionals. IMTC's first-of-its-kind, cloud-based platform enables users to leverage a highly dynamic optimization engine along with a suite of automation tools to manage bond portfolios for both high net worth and institutional clients. The combination of intuitive interfaces and purpose-built tools help streamline time-intensive workflows so our clients can focus on high value work.

IMTC's investment management software not only revolutionizes fixed income investment workflows but also plays a pivotal role in levelling the playing field for smaller firms, enabling them to truly compete with the larger wire houses. This scalability is crucial in empowering these firms to efficiently manage their operations and resources in line with their own aspirations for growth.. The work done on the IMTC platform ensures that investors of all sizes are treated with the necessary care. The platform focuses users to take appropriate action in each portfolio based on the actual need rather than just focusing on the size of the portfolio itself. IMTC's cloud-native solution allows users to make highly calculated decisions within a matter of seconds, without compromising on accuracy, all while taking custom compliance rules into account. IMTC's solution addresses the historical lack of visibility into fragmented data and analytics in fixed income, providing all firms, boutique and institutional alike, with the tools they need to drive performance and growth in today's competitive market landscape.

The IMTC team combines specific fixed income industry expertise coupled with experienced cloud developers to provide next-generation technology, delivering long-overdue automation and scalability to fixed income teams. Today, IMTC is proudly serving some of the country's top asset managers, Trust companies, RIAs, Broker-Dealers and ETF managers.

The Opportunity

IMTC is looking for an ambitious, self-starter who is looking to make an impact in the growth of a fast-growing start-up. The team is lean and primed for a record-breaking year in 2024.

The Client Success Manager will work closely with our clients and other members of the IMTC team and should be dedicated to helping clients achieve the best possible experience on the IMTC platform. The candidate will be shaped into being a key player on the Client Success team. To excel in this role, the candidate will be overseeing the following:

- Learning, understanding, and communicating client workflows.
- Have an understanding of fixed income investment management
- Maintaining and improving the tools we use to report both internally and externally.
- Be a problem solver who can produce creative, impactful solutions that can be used to enhance the client success process.
- Take pleasure in knowing that your work is helping our clients better serve their clients.

The ideal candidate should possess motivation, self-assurance, and adaptability to thrive in a demanding professional setting. With IMTC's current stage of development, this individual will have the chance to evolve alongside the company, participating in securing new deals, enhancing current partnerships, and strengthening the client success team. This candidate should have a prior background in fixed income, leveraging their expertise to support fixed income traders, ensuring our clients' ongoing success.

This is a hybrid role with at least one day a week in the NYC office (Midtown) required.

If you are looking for a challenge, we want to hear from you!

Responsibilities

- Build and maintain strong relationships with buy-side portfolio managers and traders.
- Conduct quarterly check-ins with clients (buy-side investment teams).
- Internal and external expectation management.
- Perform ad-hoc analytical work to help clients using both our fixed income portfolio management platform as well as Microsoft Excel.
- Train users on integrating our portfolio and order management solution into their daily fixed income workflows.
- Hit upselling targets on new functionality for existing clients.
- Work closely with IMTC's product team to support the implementation of new functionality for users such as portfolio managers, traders, etc.
- Maintain and improve reporting capabilities using tools such as Salesforce.
- Identify, analyze, and present ideas, timelines, deliverables, and information to platform users.

Qualifications

- 2-5 years of experience in a dedicated client success, account management role, or within fixed income supporting portfolio managers and traders
- Knowledge of financial markets, specifically the bond market, fixed income analytics and risk characteristics are a plus.
- Excellent verbal and written communication skills with a very strong attention to detail.
- Exceptional rapport building skills.
- Ability to present effectively to clients at varying levels of seniority across the organization.
- Advanced knowledge of Microsoft Excel
- Experience using Salesforce is a plus.
- Enthusiasm, persistence, resilience, and a positive attitude
- Team player willing to do whatever it takes to help the team succeed.
- Authorization to work in the United States without sponsorship.
- Desire to embrace the nature of a start-up; **company culture is critical to us.**

What We Offer

- Exciting, fast-paced work environment
- Hands-on experience in a fast-growing start-up with a collaborative and team-oriented culture.
- Opportunity to assist in the development of next generation software.
- Opportunity to explore ground-breaking ideas in cloud computing and artificial intelligence.
- Chance to contribute meaningfully at a pivotal moment in the company's growth.
- Competitive compensation and benefits

To apply, please send your resume to careers@IMTC.com.

IMTC is committed to ensuring equal employment opportunities for all employees, including qualified employment applicants. The company strives to maintain an environment free of discrimination based on race, color, religion, gender, national origin, ancestry, age, disability, genetic information, military or veteran status, marital status, sexual orientation, citizenship, or any other protected category or characteristics as defined by federal, state or local laws. This equal employment opportunity policy applies to all employment practices, including but not limited to recruiting, hiring, advertising, promotion, transfer, reductions in force, social and recreational programs, training, employee development, compensation and fringe benefits, discipline, and termination.