

## **JOB DESCRIPTION**

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<b>Position Title:</b>	Project Implementation Manager	<b>Industry:</b>	Life Insurance
<b>Reports To:</b>	Vice President, Operations	<b>Salary Range:</b>	Competitive

### **Company Overview:**

LifeTrends® is a dynamic organization which specializes in providing product intelligence to Life Insurance Companies and Insurance Distribution Organizations. We are seeking a skilled, collaborative professional to join our growing team in Austin, TX.

### **Position Summary:**

The Project Implementation Manager will be responsible for the on-time, in-budget delivery of multiple projects, while using critical thinking to improve the overall workflow. Duties will be cross-functional, participating with projects in Operations, Marketing, Sales and Product. The manager coordinates and prioritizes project tasks, manages timelines, maintains project plans and communicates status to clients, project sponsors and senior management. This person must manage change and promote the continuous improvement of project management related processes.

### **Essential Job Functions:**

- Manage client and website usage. Help the Data Integrity Group (DIG) identify trends with website login and usage and report these findings to Operations and the Concierge Service team (CST), including areas where usage is not in line with established agreements.
- Serve as liaison between departments for Sales, Operations, Marketing, and Technology innovation. Consistently document and manage projects, client and general contact records and communications using CRM and other methods of tracking workflow.
- Assist with building out internal and external training and service strategies, implementing plans to enhance our client experience as well as improve internal communications.
- Assist with identifying and re-educating agencies that are underutilizing resources.
- Assist with managing projects from marketing related to tactical activities including, but not limited to, presentation compilation and content development, marketing messaging and delivery, social media management, POINTS management, marketing campaigns and promotion. Engage, collaborate and manage activity with graphic designer. Assist with market research which may be used by agencies to distribute to producers.
- Work with the Concierge Service Team (CST) to help them engage in ongoing communication and support with each client after the close of sale. Serve as an additional liaison for carrier and distribution partners.
- Assist the Leadership Team with supporting LifeTrends strategic sales strategy to our carriers, brokerage agencies, producer agencies and other relationships. Have a vested interest in and able to articulate LifeTrends value proposition. Provide exceptional service aimed at brand



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## **Job Requirements:**

### **Experience:**

5 to 7 years of professional life insurance experience; Experience with a Sales Office (producer, brokerage general agency, insurance marketing organization, producer group) or Life Insurance Company (sales, marketing, product research and development, competitive or market intelligence, pricing) is preferred.

### **Abilities:**

Assertive and able to question the status quo; Exceptional organizational skills, as the majority of time will be coordinating tasks, directing resources and staying aware of all aspects of the project; Communication skills need to be at the highest level; Desire to work efficiently and in the most effective way possible while aligned with a team which shares the same qualities; Able to articulate thoughts and ideas, and communicate both orally and in writing with LifeTrends® team and clients; Comfortable working in situations where data is incomplete or incoherent; Ability to overcome obstacles and find solutions that best resolve the issue(s) at hand; Strong sense of self and desire to integrate into a team-oriented environment.

### **Knowledge & Skills:**

Working knowledge of the life insurance industry as a whole; Customer service-oriented, with desire to engage with clients; Extensive experience with CRM software or other client tracking system; Strong and effective communication skills; Excellent time management skills and meet stringent deadlines; Significant attention to detail; Ability to start from scratch, form thoughts and concepts, develop content and package presentations; Knowledge of database systems & Microsoft Excel preferred; Ability to learn and apply knowledge quickly.

### **Travel Requirement:**

5 - 10% for select on-site client training or conferences

## **LIMITATIONS AND DISCLAIMER**

This job description in no states or implies that these are the only duties to be performed by the employee occupying this position.

All job requirements are subject to possible modification to reasonably accommodate individuals with disabilities. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.

Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the employee must possess the abilities or aptitudes to perform each duty proficiently. Continued employment remains on an "at-will" basis.

If you are interested in being considered for the position, please submit your resume online - <https://lifetrends.com/about/careers/>.

