

Implementation Team Lead (Fintech / AI / B2B SaaS)

Position Type: Full-Time

Location: New York, NY (On-Site, 5 Days/Week Required)

Salary Range: \$175,000–\$205,000 + Competitive Equity

Role Overview

We are seeking a commercially minded, hands-on Implementation Team Lead to join an AI-native market leader in financial technology. Automating the entire contract-to-cash lifecycle for high-growth enterprises, our AI platform helps finance and accounting teams eliminate manual work and accelerate cash flow.

Functioning as a strategic, working manager, you will sit at the critical intersection of customer onboarding, finance domain expertise, and team leadership. Reporting directly to the VP of Client Services, you will be responsible for leading and developing a lean, high-performing team of Implementation Managers while remaining actively engaged in customer go-lives. In this role, you will manage end-to-end software implementations, engage directly with CFOs and Controllers, drive project management rigor, and partner closely with Product, Engineering, and Customer Success to shape our operational roadmap during an explosive growth phase.

Key Responsibilities

- **Team Leadership & Team Development:** Direct management of 2–4 Implementation Managers, owning team performance reviews, professional development, and career growth, while setting departmental standards.
- **Active Implementation Execution:** Serve as a hands-on player-coach, owning complex end-to-end customer implementations from kickoff call through go-live and aligning our platform with existing financial workflows.
- **Finance & Accounting Domain Expertise:** Act as the primary domain expert on accounting, billing cycles, revenue recognition (ASC 606), and AR processes, building high-trust relationships with CFOs, Controllers, and finance leaders.
- **Project Management Rigor:** Establish structured project governance, set timelines, hold client stakeholders accountable to key milestones, and maintain roadmaps for multi-month implementations.
- **Cross-Functional Collaboration:** Partner directly with Go-To-Market (GTM), Customer Success, and Product/Engineering teams to resolve operational gaps and directly influence the product roadmap based on client feedback.

Core Requirements

Experience & Mindset

- **Sustained Tenure & Seniority:** 5–7+ years of progressive professional experience leading software implementations in accounting and finance workflows.
- **Direct People Management:** Formal experience conducting performance reviews and driving career development (1+ year in a startup environment or 3+ years in a corporate or consultancy setting).
- **Player-Coach Mentality:** Currently hands-on in software deployment, onboarding, or delivery (e.g., Implementation Manager, Deployment Manager, Delivery Manager).
- **Domain Expertise First:** Strong expertise in accounting workflows, billing, AR, and ASC 606 revenue recognition; ability to speak the language of Controllers and CFOs fluently.
- **Traits to Avoid:** Candidates lacking formal managerial accountability (e.g., pure ICs or consultants without performance review experience), individuals with stale accounting experience (not used within the past 10 years), or candidates transitioning purely from technical support or solutions engineering.

Strategic & Functional Competencies

- **ERP Systems Integration:** Practical experience integrating enterprise ERP systems (e.g., NetSuite, Sage Intacct) with billing, AR, and financial management tools.
- **Complex Project Delivery:** Track record of managing multi-stakeholder, multi-month implementations and maintaining project momentum.
- **Background Preferences:** Background in high-growth fintech, accounting software, or SaaS. Big Four accounting background or CPA certification is strongly preferred.

Communication & Engagement Skills

- **Executive Engagement:** Exceptional ability to partner with and advise senior financial executives (CFOs, Controllers, VPs of Finance).
- **Cross-Functional Influence:** Demonstrated ability to collaborate across Product, Engineering, Sales, and Customer Success teams to drive process improvements and product enhancements.

Interview Roadmap

1. **Recruiter Screen**
2. **Hiring Manager Interview**
3. **Domain & Functional Assessment**
4. **On-Site Panel & Case Study (~1 Day)**
5. **Offer Extended**