

FOUNDATION FOR THE CAROLINAS

Title: Senior Coordinator, Customer Experience

Team: E4E Relief

Reporting To (title): Vice President, Customer Experience

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Temporary/Contract

POSITION SUMMARY

Summary:

E4E Relief, the nation's leading provider of employee disaster and hardship relief funds, and subsidiary of Foundation For The Carolinas are seeking qualified candidates to join our team as a Senior Coordinator, Customer Experience. For over 20 years, E4E Relief has been the leading provider of unique, charitable business solutions to respond to crisis and hardships quickly and efficiently. We empower companies and employees to respond to crisis by providing a global, charitable solution in times of catastrophic and unexpected need. Our hope is that the solution proves that a heartfelt response creates a stronger connection between a company and employees affected by crisis.

Role Description:

The Senior Coordinator, Customer Experience specializes in the management of client fund relationships and grant making services to ensure our customers are satisfied with the service and programs they receive. As the Sr. Coordinator, Customer Experience, your responsibilities include providing excellent customer service and customer engagement, developing, and onboarding new client relationships, and acting as an advisor regarding service and program options. You may serve as both a salesperson and more importantly, a key liaison for E4E's daily program operations.

We are seeking a resourceful and enthusiastic person to join our Relationship & Customer Experience Team. The position will report to the VP, Customer Experience and work closely with other technology and operations specialists.

DUTIES & RESPONSIBILITIES

The goals and key responsibilities of this position include the following:

Relationship Management

- Manage complex accounts/client relationships; work with clients to identify fund objectives and program needs.
- Ensure clients are highly satisfied with the service they are receiving as demonstrated by continuing to use E4E Relief as their fund management host and provide positive feedback.
- Manage and track tasks, timelines, and deadlines as it relates to onboarding and program management.
- Contribute to process improvements across the customer lifecycle to continuously improve the customer experience.
- Use complex operational data and analytics to help inform clients about their fund and provide an understanding of how the systems and technology infrastructure help support the program

Fund Execution

- Demonstrate knowledge of offerings and ensure alignment of programs/criteria with individual client needs.
- Successfully onboard clients and new Fund Advisors by training them on the tools and resources available.
- Educate clients throughout the stages of the process to provide a seamless customer experience.
- Utilize guidelines, standards, and policy to assist with development of client specific needs.
- Provide oversight and serve as the liaison between the client and internal teams when/where others are involved.
- Prepare for client onboarding, account opening/closing, and ongoing/recurring status meetings.
- Review and analyze fund information and data in the CRM.

Risk Management and Administration

- Exercise sound, professional judgment on behalf of clients and E4E, while avoiding risks and demonstrate 100% adherence to the compliance requirements of the business, program and ethical requirements, completing documentation and written records of meetings and discussions.
- Elevate high level risk issues.
- Regularly sync with internal teams to identify other risks and gaps between teams.

Business and Professional Leadership

- Provide exceptional customer service and communication skills.
- Be perceived by client as a trusted advisor on the team.
- Ensure regular and consistent communications with existing and prospective clients.

JOB QUALIFICATIONS

- 5+ years of experience in a related role desired, such as account management and demonstrated ability to navigate complex organizations
- Bachelor's degree required
- Background in consulting preferred
- Excellent written and verbal communication skills
- High level of emotional intelligence
- Proficiency in at least one CRM system, Microsoft Office, donor/relational database and building queries and running reports
- Ability to work independently, while maintaining consistent and transparent communication with a team and leadership
- Strong organizational and analytical skills, with a high attention to detail
- Ability to manage multiple and competing priorities and meet deadlines in a dynamic environment
- Ability to learn new skills quickly and adapt to new challenges
- Ability to work evenings and weekends when needed
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended periods
- Occasionally moving about to accomplish tasks or moving from one worksite and/or workstation to another

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the position. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

POSITION SPECIFIC COMPETENCIES

Select from the following position-specific competencies. Please limit the total number of competencies to 10 or less.

All Employees: Communication & Interpersonal Skills

Executive Team: Leadership Strategic Thinking Fiscal Stewardship

All Supervisors: Delegating Responsibility & Empowering Employees Managing Employee Performance Ensures Consistent Policies & Practices

General:

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| <input type="checkbox"/> Affiliate Management | <input type="checkbox"/> Budgeting & Cost Awareness | <input type="checkbox"/> Building Organizational Commitment |
| <input type="checkbox"/> Building Team Environment | <input checked="" type="checkbox"/> Client Records | <input type="checkbox"/> Concern for Employee Satisfaction |
| <input checked="" type="checkbox"/> Customer Skills | <input checked="" type="checkbox"/> Dependability | <input type="checkbox"/> Ensures Proper Training in New Technologies |
| <input type="checkbox"/> Entrepreneurial Orientation | <input type="checkbox"/> Equipment Skills | <input type="checkbox"/> Fund Management |
| <input type="checkbox"/> Implementing New Technologies | <input type="checkbox"/> Initiative | <input type="checkbox"/> Innovative Thinking |
| <input type="checkbox"/> Job Skills | <input type="checkbox"/> Managing Meetings | <input checked="" type="checkbox"/> Managing Multiple Priorities |
| <input type="checkbox"/> Meeting Targets | <input checked="" type="checkbox"/> Presentation Skills | <input type="checkbox"/> Product Knowledge |
| <input type="checkbox"/> Productivity | <input checked="" type="checkbox"/> Project Management | <input checked="" type="checkbox"/> Quality of Work |
| <input checked="" type="checkbox"/> Relationship Building/Networking | <input type="checkbox"/> Results Oriented | <input type="checkbox"/> Technical Skills |
| <input checked="" type="checkbox"/> Time Management | <input type="checkbox"/> Training & Development | <input type="checkbox"/> Writing Skills |