



Job Description: Client Service & Relationship Director

Job Title: Client Service & Relationship Director

Department: Service Department

Job Description:

A. Job Summary:

The Client Service & Relationship Director will lead a team composed of relationship and service personnel and is a key player in developing and implementing strategic relationship building programs for our Plan Sponsors and Participants. The Client Service & Relationship Director understands the importance of effective communication whether by telephone, internet, or face-to-face, exceptional service, timely response, and client satisfaction which leads to sales. This person will join a hard-working, ministry-minded team that is focused on effectively serving our religious non-profit client base.

B. Department Overview:

Our Service department has two divisions:

1. Service to Participants
2. Service to Plan Sponsors

Each division is organized similarly to serve their clients:

1. Relationship Service Specialists who are on the phone with our clients daily providing quality service
2. Online Service – educating and directing clients to our Web Portal where they can see real-time account information and manage their portfolios
3. Paperwork processing – timely, accurate processing of client requests
4. Communications – developing email templates to direct service, retirement planning newsletter/webinar content and educate Plan Sponsors and Participants of our service abilities.

C. Essential Functions:

- Collaborates with Record Keeping Department to improve the Client's Relius online experience.
- Provides leadership, development and vision to service activities for our Participants and Plan Sponsors
- Focuses on relationship building with clients

- Develops service training modules to address specific issues
- Works with Marketing department to develop effective communication pieces and webinars for Plan Sponsors and Plan Participants
- Assesses, develops and revises Service Department policies and procedures to continually strive for exceptional service
- Trains Service Managers in sales techniques
- Collaborates with Compliance department to maintain compliance standards
- Other duties as assigned

D. Organizational Relationships: (i.e. who does this person report to)

The Service Director reports directly to the CEO and President.

E. Position Requirements:

- Five years development experience with Relius/or Relius ASP
- Bachelor's degree or higher required
- Minimum of a Series 6 and 63 license
- Visionary experience with a Service team
- Visionary, strategic thinker
- Prior experience in the area of Customer Service leadership and development
- Prior experience in the area of defined contribution pension administration to include both 401(k) and 403(b)
- Working knowledge of Microsoft Windows, Excel and Word. Exposure to Customer Relationship Management software is preferred.
- Highly developed interpersonal skills
- Able to organize and prioritize multiple tasks
- Comfortable working in and with a religious culture
- Able to create and document standard operating procedures
- Able to develop, encourage and inspire a strong team
- Able to clearly communicate both verbally and in writing
- Able to prioritize and communicate the appropriate urgency and diplomacy when researching and resolving problems
- Able to work well under pressure and in a fast-paced environment

E. Competencies:

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

Customer Service

- Able to build relationships which result in sales
- Able to effectively train and monitor other team members
- Able to assess, define, and creatively problem solve

Design

- Generates creative solutions to customer service issues
- Uses feedback to modify designs and procedures
- Demonstrates attention to detail

Problem solving

- Identifies and resolves problems in a timely manner
- Gathers and analyzes information skillfully
- Works well in group problem solving situations

Communication

- Effectively communicates verbally and in writing
- Coordinates, designs, and manages webinars

Technical Skills

- Pursues training and development opportunities
- Strives to continuously build knowledge and skills
- Shares expertise with others, especially on service team
- Assesses own strengths and weaknesses

Interpersonal

- Maintains confidentiality

Oral Communication

- Speaks clearly and persuasively in positive or negative situations
- Responds well to questions
- Actively participates in meetings

Teamwork

- Balances team and individual responsibilities
- Gives and welcomes feedback
- Contributes to building a positive, successful team
- Able to energize, encourage, and motivate team

Position Type: Full-time

FLSA Status: Exempt

Pay Type: Salaried

Benefits: Eligible upon completion of first 120 days of employment

Pay Scale: Commensurate with experience within established range

Disclosure: This job description is not meant to be an all-inclusive statement of every duty and responsibility that will ever be required of an employee in the job.