



Client Services Representative I

JOB SUMMARY/OBJECTIVES

The Client Services Representative I confers with customers by telephone, customer portal, email or in person to provide information about products or services, solve issues, take or enter requests for other departments, submit feature requests, or obtain details of any other necessary product or service complaint, improvement, or other pertinent information. This individual interfaces well with product specialists, project managers, technical leads, engineers and clients to ensure a successful client support experience.

ESSENTIAL FUNCTIONS:

- Opens customer cases for tracking purposes and extends resolution to all customer matters within published client support guidelines.
- Checks to ensure that appropriate changes were made to resolve customers' problems and communicate to customer.
- Keeps records of customer interactions, records details of inquiries, complaints, or comments, as well as actions taken.
- Refers unresolved customer grievances or cases requiring further escalation to Product Specialist or other Senior Leaders for further investigation within published timeframes.
- Responds to inquiries; notifies customer of changes, updates or any planned adjustments.
- Performs customer research as needed; aids team members with Client Support functions that, in turn, increase their responsiveness & readiness as front-line agents.
- Assists in maintaining case tracking or other customer data within customer repository.
- Performs special requests, projects and billable projects as needed.
- Maintains the quota for logging into the support phone system.
- Maintains professionalism and acts courteously when working with customers and coworkers; is proactive in identifying issues for customers; recommends useful products, tools or training to customers when appropriate. Shows empathy to customer needs and develops a trusting relationship by following through with necessary or promised actions. Strives to maintain accurate and efficient resolution of presented cases.
- Opens technical requests, defects, features, or requirement gaps. Makes sure JIRA ticket is clear and concise, has all supporting documentation and is prioritized correctly.
- Attends meetings, staff training, and product & release training as required; continuously furthering expertise in VISIFI products and solutions.
- Other duties as assigned by manager.

TECHNOLOGY USED:

Salesforce

JIRA

Rippling

Microsoft Outlook

Microsoft Office Suite, including Excel

VISIFI applications as required



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KNOWLEDGE, ABILITY AND SKILLS:

This position requires strong interpersonal skills, high motivation to resolve customer issues in a timely manner, ability to perform solid needs assessments and the ability to provide a high level of satisfaction to our clients.

Knowledge of Business Application systems and terminology, Salesforce, Jira, Corporate Web tools, XML, HTML, and Internet protocols and security.

- Knowledge of VISIFI's product/services offerings
- Ability to strategically assist VISIFI assigned customers
- Ability to understand, articulate, structure and solve basic client needs.
- Ability to analyze issues and take action as required
- Ability to communicate clearly and effectively, both orally and in writing and over the phone.
- Ability to collaborate, communicate and document customer needs into the VISIFI SDLC process
- Skill in public speaking

COMPETENCIES:

- **Interpersonal Skills**--Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.
- **Service Orientation** – Actively looks for ways to provide assistance.
- **Oral Communication**--Speaks clearly and persuasively in positive or negative situations; listens and gets clarification; Responds well to questions; Demonstrates group presentation skills; Participates in meetings.
- **Strategic Thinking**--Develops strategies to achieve organizational goals; Understands organization's strengths & weaknesses; Analyzes market and competition; Identifies external threats and opportunities; Adapts strategy to changing conditions.
- **Active Learning** — Understanding the implications of new information for both current and future problem-solving and decision-making.
- **Active Listening**- Giving full attention to what others are saying, understanding the issue(s), asking appropriate questions and not interrupting.
- **Problem Solving**-Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.
- **Attendance/Punctuality**— consistently at work and on time; Ensuring work responsibilities are covered when absent; Arriving at meetings and appointments on time.
- **Teamwork**- Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.



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WORK ENVIRONMENT:

Work is performed in an office environment and involves everyday risks or discomforts which requires normal safety precautions.

PHYSICAL DEMANDS:

Work is essentially sedentary with occasional walking, standing, bending, carrying items under 25 pounds such as books, papers, small parts, etc.

COMPENSABLE QUALIFICATIONS:

High School diploma or GED with at least three years of responsible customer support experience or any combination of education, and experience that demonstrates the above listed knowledge, skills and abilities. Experience in a credit union or similar financial institution is required.

The above is intended to describe the general content of and requirements for the performance of this job. It is not to be construed as an exhaustive statement of duties, responsibilities or physical requirements. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee signature below constitutes employee's understanding and agreement of the requirements, essential functions and duties of the position.

Employee

Date

Manager

Date