

JOB DESCRIPTION	
POSITION TITLE:	Client Experience Manager
REPORTS TO:	
ORIGINATION DATE:	September 13, 2023
REVISION DATE:	NA
DOCUMENT CONTROL #:	JD 23-004
CLASSIFICATION:	Full-Time, Exempt

SCOPE OF WORK: The primary purpose of the Client Experience Manager position is to ensure that Sofer Advisors, LLC delivers a positive and exceptional experience to its clients. This job exists to oversee and enhance all aspects of the client's interaction with the company, aiming to build and maintain strong client relationships, increase customer satisfaction, and ultimately drive business growth.

ESSENTIAL DUTIES:

- Builds and maintains strong, long-term relationships with clients, serving as the primary point of contact and understanding their unique needs and expectations.
- Facilitates the smooth onboarding of new clients, ensuring they understand the company's services, processes, and how to access support when needed.
- Regularly communicates with clients to provide updates on their projects, address inquiries, and gather feedback on their experience.
- Proactively identifies and addresses client issues, complaints, or concerns promptly and effectively, working to find satisfactory resolutions.
- Develops and implements methods for measuring client satisfaction, such as surveys, interviews, or feedback mechanisms, and analyzes the data to drive improvements.
- Educates clients about the company's services, industry trends, and best practices to maximize the value they receive from the engagement.
- Identifies opportunities for additional services or products that align with the client's needs and present them as relevant solutions.

- Collaborates with peers and partners within the organization, such as sales, marketing, and operations, to ensure a cohesive and consistent client experience.
- Continuously assesses and improves client-facing processes to enhance efficiency and the overall client experience.
- Develops and implements strategies to retain existing clients, including creating loyalty programs, personalized outreach, and follow-up initiatives.

NON-ESSENTIAL DUTIES:

- Conducts market research to identify emerging trends and competitors' strategies.
- Organizes and leads client appreciation events or workshops as part of relationship-building initiatives.
- Participates in cross-functional project teams to implement major process or service improvements.
- Creates customized client reports or presentations for special requests or high-profile clients.
- Collaborates with the marketing team to develop client-focused content or materials for promotional purposes.
- Coordinates with legal and compliance teams to address specific client contract or regulatory requirements.

PREREQUISITE KNOWLEDGE, SKILLS, AND EDUCATION:

- Proficiency in building and maintaining strong client relationships, including active listening, empathy, and conflict resolution skills.
- Excellent written and verbal communication skills, with the ability to convey complex information clearly and concisely to clients and internal teams.
- A deep understanding of customer service principles and the ability to consistently deliver exceptional client experiences.
- A strong grasp of business valuations and appraisals, including knowledge of industry trends, regulations, and best practices.
- Proficiency in data analysis tools and techniques to assess client satisfaction, identify trends, and make data-driven decisions.
- Strong problem-solving skills to address client issues and challenges effectively.
- The ability to manage multiple client engagements simultaneously, ensuring deadlines are met and resources are allocated efficiently.

- Familiarity with sales techniques and strategies to identify opportunities for upselling or cross-selling additional services.
- Experience with Customer Relationship Management (CRM) software to track client interactions, manage client data, and facilitate communication.
- Effective collaboration and teamwork skills to work closely with cross-functional teams within the organization.
- The flexibility to adapt to changing client needs, industry dynamics, and organizational priorities.
- The ability to proactively identify potential issues or areas for improvement in the client experience.
- Proficiency in negotiation techniques, particularly in resolving client concerns or contract-related matters.
- A strong commitment to maintaining ethical standards and compliance with industry regulations.
- Knowledge of data privacy and security regulations to safeguard client information.

PHYSICAL AND MENTAL REQUIREMENTS:

- Ability to stand and sit for extended periods of time.
- Ability to work and communicate well with other employees and management.
- Ability to perform work utilizing manual dexterity of the hands.
- Ability to read, write, and understand English.
- Ability to work in a fast-paced environment.
- Correctable vision and hearing.
- Ability to work remotely in a home office environment.

This job description is not intended to be all-inclusive, and the employee may also be asked to perform other reasonably related job duties as assigned by their immediate supervisor as required. All employees may be required to perform duties outside of their normal responsibilities from time to time as needed.