



## Job Description

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|---------------------|----------------------|--------------------|---|
| <b>Title:</b>       | Client Services Lead | <b>Reports to:</b> | Client Services Manager   |
| <b>FLSA Status:</b> | Non-Exempt           | <b>Schedule:</b>   | Full Time: Monday-Friday<br>Generally, 8:00 am to 5:00 pm PST<br>Overtime with Notice |
| <b>Department:</b>  | Client Services      | <b>Location:</b>   | Sacramento, CA  |

### Job purpose

The Client Services Lead is responsible for the success of the daily workflow and processes within the department to ensure quality output and maintaining FCS' superior service standards while meeting deadlines. This position requires the gathering and analyzing of data while working with a team to accomplish short term goals. The Client Services Lead plays a vital role in supporting, communicating and encouraging FCS' Vision, Mission and Guiding Principles for specialized projects.

### Duties and responsibilities

#### ESSENTIAL DUTIES AND RESPONSIBILITIES:

- ✓ Monitor production for accuracy, quality and timeliness
- ✓ Perform and utilize workflow processes along with online team members
- ✓ Lead projects to meet deadlines
- ✓ Coordinate open and close coverage with Client Services Manager and other leads
- ✓ Train team on process and procedures to ensure team success
- ✓ Coordinate coverage when staff is out with Client Services Manager
- ✓ Guidance to the department when issues arise with workflow
- ✓ Review daily production reports and report to team on a weekly basis
- ✓ Review weekly reports and correct any discrepancies
- ✓ Communicate all issues, errors or vague data or findings to department manager
- ✓ Ensure month end processes are met
- ✓ Main contact person for Customer Service
- ✓ Conduct and maintain internal training of Online system so all FCS staff is capable of navigating through the online system and are kept updated of new features and updates
- ✓ Conduct cross training as needed
- ✓ Assist in troubleshooting online issues, internal & external; responding to clients on issues

#### NON-ESSENTIAL DUTIES AND RESPONSIBILITIES:

- ✓ Perform various other job-related duties as prescribed by company and departmental need

### Performance Measurements

- ✓ Ability to understand and navigate through all Secretary of State and other agency websites to locate information
- ✓ Provide accurate, consistent and precise data entry on all work assigned
- ✓ Comprehend and explain UCC (Uniformed Commercial Code) and Business Entity Requirements
- ✓ Maintain workflow to meet deadlines
- ✓ Being a proactive team player
- ✓ Manages time and company resources appropriately

## Qualifications

### EDUCATION/CERTIFICATION:

- ✓ High school diploma or greater

### REQUIRED KNOWLEDGE:

- ✓ Ability to read and comprehend the Uniformed Commercial Code, RA9 and Business Entity
- ✓ High competence of computer applications including full Microsoft Suite and internet searching
- ✓ Competent in Adobe Acrobat and a paperless work environment

### REQUIRED EXPERIENCE:

- ✓ 5 years of customer service experience in any capacity
- ✓ 3 years of working experience in a Service Company or Public Records Industry
- ✓ 1-year experience directing workflow and guiding coworkers
- ✓ At least 5 years' experience working in an office environment with 10+ employees

### REQUIRED SKILLS/ABILITIES:

- ✓ Type at least 65 WPM
- ✓ Excellent attention to detail
- ✓ Integrating information from multiple sources quickly and accurately
- ✓ Critical thinking with analytical and research skills
- ✓ Capable of successfully collaborating with peers and management
- ✓ Ability to operate and navigate on a computer without supervision
- ✓ Must have strong organizational skills with the ability to prioritize and manage multiple deadline-driven assignments.
- ✓ Working effectively as an integral part of team, in daily activities as well as addressing problems in unique situations
- ✓ Strong communication skills with reading, writing, speaking and command of the English language

## Working conditions

The worker is to work indoors and is not substantially exposed to adverse environmental conditions. May travel out of town by airplane or car to other cities for training and customer service, no more than 4 times a year.

## Physical and Mental Activities and Requirements

- ✓ Repetitive and continual typing motion is required
- ✓ Ability to continuously stand or walk
- ✓ Ability to bend, climb stairs and lift frequently
- ✓ Ability to lift up to 10 pounds frequently
- ✓ Ability to sit in an office environment for hours at a time
- ✓ Average, ordinary, visual acuity necessary to prepare or inspect documents or products or operate a computer.
- ✓ Able to hear average or normal conversations and receive ordinary information.
- ✓ Ability to apply principles of logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions
- ✓ Able to perform simple mathematics equations.
- ✓ Ability to prepare business letters, proposals, summaries, and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style.

**RECEIPT AND ACKNOWLEDGEMENT:**

I acknowledge and understand that:

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- Receipt of the job description does not imply nor create a promise of employment, nor an employment contract of any kind, and that my employment is at-will.
  - The job description provides a general summary of the position in which I am employed, that the contents of this job description are job requirements, and, at this time, I know of no limitations which would prevent me from performing these functions with or without accommodation.
  - I further understand that it is my responsibility to inform my supervisor at any time that I am unable to perform these functions.
  - Job duties, tasks, work hours and work requirements may be changed at any time.
  - Acceptable job performance includes completion of the job responsibilities as well as compliance with the policies, procedures, rules and regulations of First Corporate Solutions, Inc.
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I have read and understand this job description.

Print Employee Name: \_\_\_\_\_

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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