



**JOB TITLE:** Client Services Specialist

**DEPARTMENT:** 3CA

**REPORTS TO:** Client Services Manager

**FLSA STATUS:** Non-Exempt

**SCHEDULE:** Full-Time, M-F, 8:00 am to 5:00 pm PST, Overtime with Notice

**LOCATION:** Sacramento, CA

### ABOUT FIRST CORPORATE SOLUTIONS

First Corporate Solutions (FCS) is a global risk management and due diligence firm providing UCC and corporate solutions that help legal and financial professionals mitigate risk and perfect secured transactions. As a longtime leader in web-based due diligence solutions, FCS offers products and services across many diverse segments of the public records industry.

### JOB SUMMARY

The Account Manager plays a major role in the success of the organization by serving as a main point of contact for clients and providing front-line consultative customer service via phone and e-mail to customers. Responsible for the company's relationships with a client or group of clients and serves to understand the customer's demands, plan how to meet these demands, proactively manages the entire order process (from creation through invoice and follow-up) and develop positive working relationships with customers and strategic partners nationwide. The Account Manager is responsible for providing a broad spectrum of FCS service and their expertise to help clients manage legal, finance, risk and compliance over a myriad of governance challenges in dynamic markets and regulatory environments, globally. The Account Manager plays a vital role in supporting, communicating and encouraging FCS' Vision, Mission and Guiding Principles.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

Manage existing client accounts and work in tandem with the sales representatives with on-boarding new client accounts. Includes account set-up, maintenance communications, responding to customer inquiries and issues, billing/invoicing customers, and initiating the renewal process. Represents FCS by developing and maintaining comprehensive knowledge of FCS solutions, industry trends and general business acumen through various sources.

### **Communication - Internal**

- Keep team, manager and sales updated with client communications.
- Collaborate with processors and vendors to ensure results are satisfactory.
- Inform manager or IT team when system issues arise.
- Work in tandem with account executive on sale leads, client training, client meetings.
- Attend meetings as requested.

### **Communication - External**

- Promptly and efficiently answer incoming clients calls and or emails regarding service. questions, billing inquiries, system issues and general client concerns.
- Provide clients with formal estimate generation when requested.
- Identify opportunities for revenue growth through a better understanding of client's business needs.
- Proactively call clients to ensure satisfaction.
- Ensuring customer feedback is promptly communicated to the appropriate internal department. and sharing information regarding customer issues.

### **Client Relationship Management**

- Account setup in propriety system and ensure client specifics are documented in system.
- Act as liaison between client and various government agencies to accomplish client needs.
- Develop an in-depth understanding and anticipation of client needs to identify opportunities for revenue growth.
- Responsible for maintaining a high level of professionalism with clients and working to establish a positive rapport with every client.

### **Order Management**

- Communicate specific order instructions through OES task notes and tasks entered.
- Review of results and reports to provide clear, detailed reporting of items found during due diligence investigations.
- Review all client invoices for accuracy and comprehensiveness before delivering to client.
- Review entire order for delivery to client in a timely manner.
- Examine all data sources to ensure only the highest quality, most accurate resources are used to complete service requests.
- Update and document client contact in the client database as necessary.
- Effectively work with processors on order status or changes and/or delays to customer.
- Quality review of completed results.
- Meet minimum production requirements assigned.
- Generate production report and send to supervisor at end of day.
- Review overdue work order report to ensure clarity of all orders in queue.

## **NON-ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Proactively pursue professional development activities (e.g., reviewing professional publications, establishing personal networks, continuous industry training and updates).
- Perform various other job-related duties as prescribed by company and departmental need.
- Cross train with team and other departments.
- Serve as departmental coverage as needed AND other duties as directed by Manager.
- Assist Manager with special projects and reports.

## **REQUIRED QUALIFICATIONS**

\*Includes Physical and Mental Requirements\*

### **Education**

- Minimum Education: High School Diploma.

### **Experience**

- 0-4 years of customer service experience in any capacity.
- 0-2 years' experience working in a deadline driven environment with concentration on quality.

### **Knowledge, Skills and Abilities**

- Ability to read and comprehend the Uniformed Commercial Code (RA9), Corporations Code and MARs rules.
- Ability to quickly learn and navigate propriety systems.
- High competence of computer applications including full Microsoft Suite and internet searching.
- Competent in PDF Studio Pro, Adobe Acrobat and a paperless work environment.
- Strong communication skills with reading, writing, speaking and command of the English language.
- Critical thinking with analytical and research skills.
- Capable of successfully collaborating with peers and management.
- Detailed, organized, time management, and multi-tasking skills.
- Ability to operate and navigate on a computer without supervision.
- Work effectively in a teamwork environment, in daily activities as well as address problems in unique situations.
- Online research skills.
- Possess fundamental mathematic skills.
- Demonstrated commitment to high professional ethical standards in a diverse workplace.
- Ability to apply principles of logical or scientific thinking to define problems, collect data, establish facts and draw conclusions.

- Ability to prepare business letters, proposals, summaries and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style.
- Ability to continuously sit, stand or walk in an office environment.
- Ability to bend and lift up to 10 pounds.
- Average/ordinary visual acuity necessary to prepare or inspect documents or products and operate a computer.
- Able to hear average or normal conversations and receive ordinary information.

## **PREFERRED QUALIFICATIONS**

### **Education**

- Some college or bachelor's degree in business-related field.

### **Experience**

- Prior experience in risk management, compliance, UCC, public record, finance or legal industry.

## **WORKING CONDITIONS**

The worker is to work indoors and is not substantially exposed to adverse environmental conditions. Repetitive and continual typing motion is required.

May require occasional travel out of town by airplane or car to other cities for training, no more than 4 times a year.

**First Corporate Solutions is an EOE and offers a competitive benefits package. Salary is DOE. To be considered for this position please submit your resume and cover letter summarizing your experience to [careers@ficoso.com](mailto:careers@ficoso.com). Thank you for your interest!**

**RECEIPT AND ACKNOWLEDGEMENT**

I acknowledge and understand that:

- Receipt of the job description does not imply nor create a promise of employment, employment contract of any kind, or violate at-will employment.
- The job description provides a general summary of the position in which I am employed. 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.

I have read and understand this job description.

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

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

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