

## Client Onboarding Specialist

### About RenPSG

RenPSG provides complete philanthropic solutions through technology-enabled business services including cloud apps, consulting, and administration. We provide technology and service so our clients can focus on their donors' giving and their own growth.

Headquartered and operated in Indianapolis, Indiana, RenPSG is the largest independent philanthropic solutions provider in North America. With 30 years of industry knowledge and experience, RenPSG delivers custom solutions that include tax expertise, accounting support, and impeccable client service, all through our proprietary cloud computing technology. We count financial services firms, elite nonprofit organizations, and leading community foundations as our partners. Currently, RenPSG services \$16 billion in assets, including charitable trusts, donor-advised funds, pooled income funds, endowments, and private foundations.

### Client Onboarding Specialist

Onboarding Specialists are responsible to be the “end-to-end” owners of the client onboarding experience for RenPSG services and technology products. The Onboarding Services team is responsible to facilitate onboarding coordination across internal partners and external clients to meet target go-live dates. This position executes the day-to-day processes, liaising directly with clients and developing and delivering enhancements to onboarding processes and systems. This position requires excellent communication skills, strong collaboration with many personality types, and a high degree of accuracy. The ideal candidate will be self-motivated, resourceful and have impeccable time- management skills.

### Duties & Responsibilities:

- Directly interface with and lead the Client through the implementation process from the contract signing date through hand-off to the service team
- Develop expertise in product offerings and each client's unique needs and requirements
- Validate product features and functionality with the client to ensure full understanding of service to meet their business requirements
- Work closely with Client Advancement, Product Management, Operations and IT, coordinating all functional project tasks to ensure timely implementation of the product or service to the client's satisfaction
- Coordinate the data migration from existing client systems to RenPSG systems
- Escalate any product or client issues for timely resolution

- Identify upsell opportunities and make appropriate referrals
- Complete implementations on time or early to accelerate revenue streams and client success
- Ensure Client Advancement team is enabled to focus on sales by acting as a trusted partner in owning client onboarding activities
- Identify and implement process improvements and automation to help improve and streamline workflows
- Provide training for clients, both remote and in-person
- Prepare process and procedure manuals for each new client to ensure a smooth transition to the service team

### Knowledge, Skills & Abilities

- Bachelor's degree or higher is a plus
- Management experience, including team development
- Ability to maintain a high level of activity, manage competing priorities and work efficiently in a results-driven environment
- Project management or business analyst experience is preferred
- Effective communication skills, both verbal and nonverbal
- Possess excellent organization and planning skills
- Superior time management skills to be able to multi-task
- Self-motivated with a positive and professional approach
- Strong business ethics and personal integrity
- Certification in process improvement is a plus