

Client Services Representative

Reports To: Operations Manager
Department: Customer Care
Posting Date: August 1, 2022
Location: Greenwood Village, CO



Prosper Retirement Partners is an organization founded by two industry veterans, who believe the emergence of the State-mandated retirement programs will result in record numbers of new 401(k) plan establishments. By leveraging the latest technology and regulatory structures to evolve the traditional retirement plan business, our goal is to build an organization that surpasses our previous successful ventures. This is a unique opportunity to join a fast-growing company and become a foundational member of our sales team.

POSITION SUMMARY

This position serves as a liaison between the Company, our Plan-Clients and any co-engaged third-party service providers. Our CSRs are responsible for various administrative activities related to new Client onboarding and routine questions & answers from Plan-Clients.

KEY RESPONSIBILITIES

- Coordinate new Plan-Client onboarding and performing related administration tasks.
- Manage all aspects of the customer service experience, in direct contact with Plan-Clients' personnel.
- Intermediate all Plan-Client interactions with third-party service providers.
- Develop & implement internal processes and procedures to improve operational efficiency.

PRIMARY ACTIVITIES

- Review, Process & File new Plan-Client paperwork - online and hard copy.
- Collect missing Employee Census files and submit to third-party service providers.
- Coordinate Plan-Client implementation & onboarding with third-party service providers.
- Conduct new Plan-Client "Welcome Calls" to provide product orientation and website training.
- Conduct periodic Client satisfaction surveys and live follow-up calls with Plan-Clients.

JOB QUALIFICATIONS

- **Minimum two (2) years B2B Customer Service or Relationship Management experience.**
- Strong personal work ethic & professional integrity.
- Team-oriented personality, with demonstrated ability to work independently.
- Good organizational & prioritization skills, with refined attention to detail.
- Strong verbal & written interpersonal communication skills.
- Elevated PC proficiency with developed experience with Microsoft Office
- Previous experience working with Salesforce.com preferred.

COMPENSATION

Prosper Retirement offers a competitive compensation, including base salary and bi-annual bonuses. We offer standard benefit programs that include health, dental, vision and disability insurance plans, as well as a Safe Harbor 401(k) plan with employer matching.