Title: Sr. Coordinator, Onboarding

Division/Department: Customer Experience & Applicant Experience

Reporting To (title): Vice President & Director, Customer Experience and Applicant Experience

FLSA Classification: Exempt Non-Exempt

Employment Type: Full Time Part Time Intern Temporary/Contract

POSITION SUMMARY

E4E Relief, the nation’s leading provider of employee disaster and hardship relief funds, and subsidiary of the Foundation for the Carolinas are seeking qualified candidates to join our team as an Sr. Coordinator, Onboarding. For over 20 years, E4E Relief has been the leading provider of unique, charitable business solutions to respond to crisis and hardships quickly and efficiently. We empower companies and employees to respond to crisis by providing a global, charitable solution in times of catastrophic and unexpected need. Our hope is that the solution provides a heartfelt response to a stronger connection between a company and employees affected by crisis.

The Sr. Coordinator, Onboarding will serve as an integral member of our Customer Experience Team. Partnering with new clients to coordinate and facilitate a successful onboarding (launch) as they design, implement, and launch their Employee Relief Fund program with E4E Relief. During this critical and important early phase of the customer lifecycle, the Sr. Coordinator, Onboarding provides the solid foundation that drives customers’ future successes for program and platform understanding. Following a successful launch, they will support a smooth transition to the client relationship manager (RM) who will be the primary point of contact for the relationship going forward.

As existing clients expand their programs to provide additional relief to their employees the Sr. Coordinator, Onboarding is integral in ensuring all details of an expanded program are implemented with accuracy and communicated across all teams. On the rare occasion a client closes their fund with E4E Relief, the Sr. Coordinator, Onboarding is responsible for managing the offboarding process with the client and internal teams ensuring all steps are followed.

E4E Relief is a fast-growing organization, and the Sr. Coordinator, Onboarding is pivotal in ensuring best in class customer experiences.

DUTIES & RESPONSIBILITIES

- Support any additions or program expansions for existing clients
- Establish expectations regarding the onboarding/expansion processes and timelines
- Track and communicate onboarding activities, both new and expanding programs, across all internal teams to ensure readiness and capacity
- Partner with the technology and operations teams to set-up the new client portal, application, and support functions aligned with new program’s eligibility requirements and scoped services as identified through the sales/contracting process or to make the appropriate changes for program expansions
- Ensure proper set up for launch regarding the technology needs for the platform based on the volume and number of projected users.
• Partner with new clients to ensure they continue to build an understanding of the platform and program requirements
• Seek feedback from clients to ensure E4E Relief is meeting their needs during the launch experience
• Demonstrate the technical accessibility and ease of use of the platform to both highly technical and non-technical audiences
• Listen to and understand the customer’s needs and provide proactive suggestions as well as answers to improve customers' use and satisfaction
• Continuously analyze launch processes, procedures, customer feedback and tools to develop enhancements to be implemented in future launches. Use feedback from training sessions to help drive enhancements to our product
• Conduct post-launch activities including surveying new clients and providing appropriate summaries to both internal and external constituents
• Work with the relationship managers (RMs) to facilitate a seamless transfer once the program is active
• Manage offboarding process for clients closing their funds

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the position. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

**JOB QUALIFICATIONS**

- Bachelor’s Degree required
- 3-5 years of experience in a related role
- Ability to closely manage workplans and related stakeholders
- Knowledge of and expertise navigating and leveraging a CRM for workflow management
- Strong communication and follow-up/follow through skills
- Strong attention to detail
- Technical know-how/savviness
- Process and customer service orientation
- Self-starter and able to work independently
- Highly organized and strong attention to detail
- Excellent written and verbal communication abilities
- Ability to prioritize and manage multiple responsibilities
- Teamwork orientation with ability to effectively work across several teams to achieve goals
- Creates excitement and a strong sense of urgency when working with a high volume of new clients
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended periods and ability to occasionally move about to accomplish tasks or move from one worksite and/or workstation to another

This role is in Charlotte, NC. While we are temporarily working remotely during the COVID-19 pandemic, the position will require in-person presence in Charlotte.

Note: Proof of fully authorized vaccinated Covid-19 status is required (or E4E Relief authorized religious or disability accommodation).

**POSITION SPECIFIC COMPETENCIES**

Select from the following position-specific competencies. Please limit the total number of competencies to 10 or less.

- **All Employees:** ☒ Communication & Interpersonal Skills
- **Executive Team:** ☐ Leadership ☐ Strategic Thinking ☐ Fiscal Stewardship
All Supervisors: □ Delegating Responsibility & Empowering Employees □ Managing Employee Performance □ Ensures Consistent Policies & Practices

General:
□ Affiliate Management □ Budgeting & Cost Awareness □ Building Organizational Commitment
□ Building Team Environment □ Client Records □ Concern for Employee Satisfaction
□ Customer Skills □ Dependability □ Ensures Proper Training in New Technologies
□ Entrepreneurial Orientation □ Equipment Skills □ Fund Management
□ Implementing New Technologies □ Initiative □ Innovative Thinking
□ Job Skills □ Managing Meetings □ Managing Multiple Priorities
□ Meeting Targets □ Presentation Skills □ Product Knowledge
□ Productivity □ Project Management □ Quality of Work
□ Relationship Building/Networking □ Results Oriented □ Technical Skills
□ Time Management □ Training & Development □ Writing Skills