

Customer Onboarding Coordinator

Description

Guideline is looking for a Customer Onboarding Coordinator to join the Customer Operations team. Candidates can reside in MT or PT time zones; this includes candidates in CO, WA, or El Paso/Hudspeth Counties (TX). Team members will work Monday – Friday, 9:00am to 5:30pm Pacific Time â this might be subject to change throughout the year. What will you work on? Guideline is looking for an Onboarding Coordinator to act as a first contact for small businesses implementing a new Guideline 401(k) and support them throughout the process. In this role, you'll work with a portfolio of clients ranging from small business owners to C-level executives. You will report to Guideline's Onboarding Manager, will quickly become an expert on Guideline's suite of products so you can provide an excellent client experience that inspires confidence in Guideline as their retirement plan provider. Be the first point of contact for Guideline's clients through phone calls and email. Assist with new client onboarding and education. Work collaboratively and cohesively with Sales, Operations and Customer Success. Aggregate feedback and recommendations from clients to define our product roadmap. Assist with monthly projects, or any ad-hoc projects. Support documentation of processes & procedures. The Team The Onboarding team is responsible for providing an excellent, educational experience to our clients, as we are the first team our clients will experience in their journey with the Guideline product. We aim to design an easy and seamless implementation process for an often complex employee benefit system. Our goal is to trust with our clients, creating approachability and transparency, and laying the foundation for a delightful client experience. Required Qualifications - 2+ years of client-facing support experience - Experience with customer support platforms and CRMs (JIRA, Salesforce, Talkdesk) - Ability to pick up new technologies, assess situations quickly, and look for smarter, more efficient ways to provide an educational client experience - Creative and analytical problem-solving abilities - Exemplary phone, listening, and writing skills - Bachelor's degree preferred or equivalent field-related experience More About Guideline Everyone should have a simple, affordable way to save for retirement. At Guideline, our plans are low cost and highly automated. This makes it easy for companies to offer a valuable benefit â and easy for people to invest in their financial future with confidence. Offer Package The expected Salary Range for this position is \$70,000 annually. Compensation is determined by numerous factors such as your qualifications, experience, and work location. Additional benefits: - Flexible vacation policy - Company equity - 401(k) with matching contributions - 100% paid employee insurance coverage - Annual learning and development stipend - Parental leave - Sabbatical after 5 years of employment Guideline provides equal employment opportunities to all employees and applicants for employment without regard to race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability status. Employment open to residents of CO, TX, and WA. Guideline is committed to protecting the privacy and security of the personal information of our applicants. Please refer to Guideline's Privacy Policy for information about our privacy and security practices. #LI-Remote Please mention the word **KINDNESS** and tag RMTUxLjk1LjZNS4xNQ== when applying to show you read the job post completely (#RMTUxLjk1LjZNS4xNQ==). This is a beta feature to avoid spam applicants. Companies can search these words to find applicants that read this and see they're human.

Contacts

Job listing via RemoteOK.com

Hiring organization

Guideline, Inc.

Job Location

Burlingame, California, United States

Base Salary

\$ 70000 - \$ 100000

Date posted

April 27, 2024

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