eProsper
An SVB Analytics Company

Position Title: Account Representative
Location: San Francisco/San Mateo

Job Focus:
Act as primary contact for representing eProsper clients post-sale throughout the duration of their lifecycle as CapMx® subscribers. Provide client implementation services, CapMx support services, CapMx training for clients, and further support during renewal process.

Job Responsibilities:
- Manage client account and perform tasks as they relate to the clients' lifecycle phases (i.e. Implementation, Training, Support, Renewal, etc.).
- Review client agreements.
- Conduct introductory call and explanation of role and ongoing services and support throughout all phases.
- Proactively contact clients on a periodic basis in order to gauge clients' satisfaction and need for additional training or support, inform client of enhancements to CapMx, verify current authorized users and notify clients of any change in fees.
- Review, interpret, and prepare clients' existing data prior to importing.
- Set up companies and authorized user access on Visual Basic (VB).
- Review client spreadsheets/templates and update/correct if necessary.
- Resolve data issues, assist client with reconciliation, and prepare client capitalization table for sign off.
- Act as project manager for all clients through Implementation including working with internal and external resources regarding client data.
- Provide CapMx training as well as ongoing support to clients.
- Diagnose client issue and communicate answer clearly, concisely and accurately.
- Adhere to timelines set by management and clients.
- Utilize CRM tool to manage clients and support management needs.
- Assist management with other client service related needs as requested.
- Assist with ongoing CapMx enhancements, provide feedback, and actively initiate additional system requests through Research & Development

Requirements:
- Excellent verbal and written communication skills
- Detail orientated with exceptional organizational skills
- Strong commitment to client service
- Excellent problem solving skills
- Solid knowledge of Excel and Microsoft Word, including but not limited to manipulating spreadsheets using data validation, text-to-columns, paste-as-special, concatenate and math function features
- Maintain consistently high level of professionalism
- Provide high quality service through communication, commitment and teamwork
- Adapt to changing priorities and be able to complete tasks independently
- Demonstrate high degree of initiative and maintain a consistently positive attitude

Education: Bachelors Degree is required

Experience:
- 1-2 years of managing corporate client relationships or similar experience is a plus
- Knowledge of equity management or stock administration for privately funded companies is a plus
- CEP certification or development within the program is a plus
- Salesforce.com knowledge is helpful

Salary: Competitive and commensurate with applicant's skills and experience