



Job Title: National Director of Client Services
Level: Management level role, Head of the Client Services Dept.
Position Type: Full-time, Salaried Exempt
Location: Fairfield, CT – The person in this role will work remotely from home until our CT office fully re-opens post COVID concerns/protocols
Date: 04/20/21

Overview/Job Description:

Foundation Source seeks a National Director of Client Services to join its leadership team. This multi-faceted role will involve these five functional areas and have the skills detailed below:

Strategist: [company-facing and team-facing]

- Define high quality Client Services and set quality standards for delivery and the client experience
- Be a voice for the client internally during strategy planning, budgeting, product prioritization, etc. Own Client Success at Foundation Source.
- As a member of the firm's management team, identify, design, and manage corporate initiatives to enhance and improve client experience.

Leader, Champion and Team Representative: [company-facing and team-facing]

- Advocate on behalf of the team to ensure it receives the support and resources it needs to deliver high-quality Client Services to Foundation Source Clients.
- Lead the Client Services Department (comprised of approximately 40 team members) with five direct reports.
- Partner with other areas of functional excellence (e.g., Legal, Philanthropic Advisory) to deliver tailored client-facing solutions.
- Cross-departmentally collaborate with colleagues and staff to initiate, review, and implement service tier changes and pricing adjustments for clients.
- Play an active role in valuing Client Services relative to the marketplace and participate in pricing Foundation Source Services accordingly.

Ambassador and Problem Solver: [external stakeholder-facing]

- Represent Foundation Source to clients and prospects; when needed, identify solutions to service delivery challenges. Energized but polished.
- Responsible for retention and relationship success of more than 1,700 private foundation clients (family, corporate, staffed, independent).
- Understand the nature and concerns of a high-end client base.
- Develop client-centered outreach content.

Mentor/Trainer: [team-facing]

- Model high quality delivery of Foundation Source Client Services and mentor and train Client Services team members.
- Demonstrate commitment to service.
- Build, manage and foster a team that is focused on delivering a high-quality client experience that engenders loyalty and referrals.

- Establish cross-training and workflows that enable the team to sustain service and quality levels through periods of growth and expansion.

Change Leader and Implementer: [company-facing and team-facing]

- Identify opportunities to increase efficiency and shift the role of the Private Client Advisor to someone who both delivers key Foundation Source services and cultivates strong relationships with our clients.
- Lead change within the client services organization, helping to transition both mindset and behavior toward relationship management.
- Ensure the delivery of superior and solutions-based client support to all private foundation clients.
- Identify and oversee execution of initiatives to further enhance the relationship management function of the client services department and improve efficiency and staff knowledge.

Responsibilities:

- Own Client Success at FS
- Lead change within the client services organization, helping to transition both mindset and behavior toward relationship management
- Build, manage, and foster a team that is focused on delivering a high-quality client experience that engenders loyalty and referrals
- Establish cross-training and workflows that enable the team to sustain service and quality levels through periods of growth and expansion
- Partner with other areas of functional excellence (e.g., Legal, Philanthropic Advisory) to deliver tailored solutions
- Work directly with demanding clients in a high-touch relationship AND managing high-stress, difficult situations toward resolution and client satisfaction
- Be a voice for the client internally during strategy planning, budgeting, and product prioritization
- Partner with relevant areas in the organization to ensure a streamlined and efficient client experience from Day 1
- Partner with marketing on a client communications framework and execution

Skills and Experience:

- Proven record of developing and implementing change-management strategies.
- Strong philanthropy background.
- Experience in addressing Ultra High Net Worth and High Net Worth client concerns and devising creative solutions that are consistent with the company's service delivery model and resources.
- Demonstrated commitment to partnering with other teams to develop and deliver client-centered solutions.
- Natural leadership skills that emphasize leading by example, mentoring and clear communication.
- Demonstrated ability to work in cyclical businesses.

Attributes:

- Passionate about service
- Wants to effect change
- Natural leadership tendencies
- Energized but polished

- Sensitized to the issues and concerns of a high-end client base
- Demonstrated ability to work in cyclical businesses

Physical Demands and Work Environment:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

Note:

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.

About Foundation Source:

Foundation Source is the nation's largest provider of management solutions for private foundations. We empower people and companies to create a better world with their philanthropy through a configurable suite of administrative, compliance, and advisory services complemented by purpose-built foundation management technology and private foundation experts.

We work in concert with financial advisors, legal and accounting professionals, consultants, and family offices, as well as directly with individuals, families, and corporations to bring philanthropic visions to life. As we celebrate our 20th year of service, Foundation Source supports nearly 2,000 family, corporate, and professionally staffed foundations of all sizes and has enabled more than \$7 billion in charitable grants.