



## Client Experience Specialist

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Join our Client Experience Team! Do you enjoy assisting business professionals from all over the United States obtain the tools they need to operate? Do you excel at building relationships over the phone that reinforce trust and confidence? Do you find it rewarding to participate in and foster strong inter-department relationships that work toward a common goal?

Located above the Rocking R-Bar in Downtown Bozeman, TRG provides international insurance products to over 10,000 companies worldwide. Our innovative approach has positioned TRG as the market leader in consumer-direct US Customs Bonds.

Our Client Experience Specialists for New Business provide administrative support to our sales producers by assisting in client relations after the close of a sale as well as processing and filing the bond policies accurately and timely. Our producers rely on their CES to continue to foster the trust in TRG that the producer has developed by providing peak client service.

### Responsibilities:

- Process new bond sales per regulatory and company policies accurately and timely
- Communicate regularly with Sales producers to foster effective and positive working relationships
- Communicate timely and professionally with all clients, addressing all client needs in the expected manner per company policy and procedures
- Provide administrative support to other CES or administrative departments as necessary or time permits

### Requirements:

- Ability to foster strong relationships over the phone with clients and in person with co-workers throughout all departments
- Ability to multi-task in a fast-paced, team environment and maintain composure and efficiency with deadlines and fluctuating workload cycles
- Above average proficiency in learning and utilizing new computer software programs
- Extraordinary written and verbal communication skills
- Desire to learn and master the international insurance industry

### Benefits:

- Group Health, Dental and Vision plans
- Company sponsored 401(k) plan
- Casual dress code
- Personal Time Off, 15 day accrual schedule in your first year plus 8 company holidays
- Montana Living; Blue-river fly-fishing rivers, world class skiing, hiking, hunting
- Customizable schedule within a 40 hour week, Monday through Friday, 7:00am to 4:30pm with an hour or half hour lunch

Job Type: Full Time

Salary: \$30,000/year

### Experience:

- Customer Service: 1 Year (Preferred)

To apply, please submit your resume through this page, or e-mail directly to [HR@TradeRiskGuaranty.com](mailto:HR@TradeRiskGuaranty.com), thank you.

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Trade Risk Guaranty (TRG) is an international trade insurance agency headquartered in Bozeman Montana. Our consumer-direct approach has grown our company to include more than 10,000 clients and 50 employees. We offer careers in sales, marketing, customer service, office administrations, information technology and insurance underwriting.

Locate your career and apply online at [www.traderiskquaranty.com/careers.aspx](http://www.traderiskquaranty.com/careers.aspx)

## Job Description

**Revision Date:** August 20th, 2018 **Author:** Geneva Wild/Laura Michel

**Position Status:** Full Time  Part Time  Exempt  Nonexempt

**Position Title:** Client Experience Specialist **Department:** CES

**Immediate Supervisor:** Client Experience Manager

**Positions Supervised:** n/a

### Position Description:

Administrative support and client communication to support all CES functions

### Major Areas of Responsibility:

50% - Client administrative services

50% - Effective communication and relationship building with clients, Sales team, department team, etc.

### Specific Responsibilities:

- Respond professionally and immediately to client and potential client inquiries; develop strong relationships during telephone and e-mail interactions.
- Learn/master the U.S. Customs bond industry through progressive training and responsibility; bond purpose, uses, requirements, responsible parties, problems, communications from Customs, claims, underwriting, etc. Be prepared to share knowledge and educate clients.
- Review, analyze and process all client and sales department documents, communications, and required follow-up with high attention to detail and accuracy, within deadlines.
- Utilize, update appropriately, and ensure accuracy of SalesLogix database.
- Support senior team members and co-workers as needed for all clients, new and current.
- Perform all duties in a safe manner, in accordance with TRG's Safety Program.

### **Specific Responsibilities (Continued):**

NOTE: This position is intended to provide flexible support for all CES department roles; other specific duties in addition to the general duties above will be regularly assigned.

### **Required Knowledge, Skills, and Abilities:**

- Possess a "Can Do" attitude; work accurately and effectively with changing priorities and deadlines.
- Communicate effectively and contribute positively as a CES team member, and across all TRG departments; exceptional written and verbal communication skills required.
- Possess ability to write professional correspondence using proper grammar, punctuation and spelling.
- Provide exceptional customer service to clients and potential clients; exhibit willingness to research and problem solve using knowledge acquired with experience.
- Possess a love of learning and the ability to be quick learner. Continue to learn about the international trade industry, TRG products and services, and become comfortable promoting them during client contact.
- Remain extremely detail-oriented, accurate, and comfortable working in a fast-paced team environment while meeting deadlines.
- Possess a high level of comfort and competency using standard PC and basic software programs, including Outlook e-mail.
- Maintain a high degree of confidentiality, personal integrity, and trustworthiness.

**Education and Experience:**

Required:  
Bachelor's degree, or equivalent combination of business-related experience/training

**Physical Demands:**

Primarily a sedentary position; extensive time spent performing computer data entry, so visual ability to see computer screen and hand/wrist dexterity to use computer keyboard; ability to hear and communicate on telephone and in person; mobility as needed to scan, use copier and fax, meet with other staff in office, etc.

**Work Environment:**

Based in Bozeman office, which has an open floor plan with group work stations. Position is regularly scheduled for 40 work hours each week, and work hours in excess of that are not allowed for this non-exempt position without advance approval by management.

This job description outlines the major requirements for this position, but is not designed to cover all possible work situations, or contain a comprehensive listing of all activities, duties, or responsibilities that are required of the employee. Other duties as required may be assigned by management.

**Department Manager:**

Colette Lang

**Human Resources:**

Geneva Wild

**Senior Management:**

Laura Michel

**Employee Name (Print):** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_