

Customer Onboarding Specialist



Phone :
Web :

Job Summary

Vacancy :
Deadline : Jul 15, 2024
Published : Jun 15, 2024
Employment Status : Remote
Experience : Any
Salary :
Gender : Any
Career Level : Any
Qualification :

Job Description

What's Bench? Visit [Bench's latest news](#) to see what's happening, and [read what our customers have to say](#). You can also check us out in [Medium](#), on our [LinkedIn page](#), our [Instagram](#), and our [Life at Bench Blog](#).

We acknowledge that Bench is founded on the traditional, ancestral, and unceded territory of the Coast Salish Peoples, including the territories of the x̱məθkwəy̱əm (Musqueam), Skwxwú7mesh (Squamish), and Səl̓ilwəta̱/Selilwitulh (Tseil-Waututh) Nations.

Businesses need to understand their financial performance, but for many smaller ones, this means a trade-off between managing their books and running their businesses.

Our mission is to help every business owner thrive, by providing financial insight and peace of mind in one seamless platform. From creatives to chiropractors, Bench helps thousands of small business owners and entrepreneurs master their financial lives. Because understanding your finances should be three things: simple, effortless, and affordable.

We're growing fast, and we're looking for exceptional people to join us on this incredible journey. Check out our [culture guide](#) to learn more about what it's like to work at Bench and read more about our business [here!](#)

What does the Onboarding Team look like?

The Onboarding Team is laser-focused on customer experience and the teams' mandate is to set customers up for a successful relationship with Bench. As a member of this team, you'll play a key role in working with our new and current customers. You'll be one of the first people at Bench delivering value to our customers as you set up their accounts, walk them through what to expect from our services, and set clear expectations that will allow for seamless bookkeeping moving forward.

What you'll get up to:

- You'll be on the phone with customers – a lot! Onboarding Specialists are expected to talk all things Bench with up to 5 customers a day and it'll be up to you to bring passion and expert knowledge to our growing customer base.
- You'll be taking ownership of an ever-changing portfolio of customers that will rely on you to set up their accounts, explain our service, and you'll be answering any questions they might have about our services. Whatever they need, you'll be their initial advocate within the business to provide them what they need to succeed.
- Collecting and certifying key documentation from customers in your portfolio to ensure accuracy and ongoing compliance of their monthly and annual financial insights.
- Organize internal stakeholders to provide solutions for customer issues. Not every new customer's onboarding experience ends with their first call and you'll need to liaise with different teams to check in and make sure customer needs are being met.
- You'll grow your tech skills by managing your workflow, using multiple software tools like Salesforce, Salesloft, RingCentral, Google Sheets, and the Bench App.
- Bench is a growing business and with that growth comes the need for process development and constant feedback. You'll be working with your peers and leaders to continuously iterate in developing an effective and efficient service.

What you'll need:

- **Customer-first Mentality:** The best reps on our team go the extra mile for our customers and will take the extra time to ensure that the customer's needs are addressed properly. This means digging deep into customer issues and providing clear solutions that will positively impact the customer's experience.
- **Communication:** Clear and concise communication (verbal and written) makes sure we're efficiently passing messages between customers and internal stakeholders. You'll also need to consistently communicate value to customers and lead with the "why" when asking customers and others to perform actions.
- **Organization:** Members are responsible for self-organizing and tracking the progress of their work. The ability to organize your workflow, create efficiencies, and prioritize work allows reps to widen their impact across our customer base. Multi-tasking and time management lead to strong results on the team!

It could be an even better fit if you:

- **Agile:** You'll be supporting process iterations with respect to the onboarding team and, as a result, will need to adapt to new situations, workflows, and customer problems. Fast learners who can pivot quickly and people who have experience working in fast-paced environments are a major plus!
- **Creative Problem Solver:** We're always dealing with the next problem and we love having creative thinkers who challenge the status quo. Candidates who've helped build systems from scratch will have a major impact.
- **Resilient:** We are looking for team members who are able to experience the highs and lows of being a part a startup. Not every workflow is a success, and your willingness to fail is a major piece of how we continue to progress. Candidates should always have their end goals in mind, and be comfortable working in an environment where targets are challenging.
- Have prior experience in Customer Success or Customer Service using CRM tools such as **Salesforce, Jira, and Slack**.
- Prior experience in Customer Success or Customer Service.

What you'll get:

- At Bench, we share information freely and openly whenever possible. All Onboarding Specialists will start at a base salary of \$44,500. From there, with Variable Pay, the On Target Earnings (OTE) for the role is \$50,500
- In addition, we offer an extended benefits package that includes paid vacation, paid flex days, and full health, dental, and vision.
- You'll get access to [Inkblot Therapy's](#) Employee and Family Assistance Program (EAP) that offers counseling and support, for you and family members, as well as professional development coaching, financial advice, legal advice and much more.
- You will have the support of your manager, and the opportunity to learn and develop with a team of unconventional & diverse Benchmates, who are all working together to achieve the same mission.
- We have a number of Affinity Groups - groups of people who have shared identities and experiences! The purpose of these groups is to support underrepresented Benchmates and amplify their voices.
- You'll have the opportunity to work from somewhere other than your home province for up to 3 months, within a 12 month period.
- If you live in BC's Lower Mainland, you have the opportunity to work at home or in our downtown office location, depending on your preference! If you're interested in remote only, we currently focus our hiring efforts in the following provinces: British Columbia, Alberta, Ontario, New Brunswick, and Nova Scotia.
- We provide solutions to bring all teams together for collaboration and connection.
- Regardless of how many days you decide to visit the office, you'll have access to our Home Office Setup Fund to ensure that you have everything you need to work comfortably from home, from day one.

Everyone has their own unique talents. Even if you don't meet 100% of the qualifications outlined above, tell us why you'd be a great fit for this role in your application.

We believe that unchecked biases disproportionately impact the most marginalized people in society—including but not limited to BIPOC, LGBTQ2S+ people, immigrants, and people with disabilities. We strongly encourage applications from people with these identities or other marginalized communities because we believe that without you, we are all less. If you are selected for an interview and require support during the process, including disability accommodation, we'll give you the opportunity to tell us when we contact you.

Education & Experience

Must Have

Educational Requirements

Compensation & Other Benefits
