



CLIENT SUPPORT SPECIALIST

Reports to | Director of Business Services



PURPOSE

The Client Support Specialist (“CSS”) works with the team to ensure the smooth operation of MFA’s client facing programs and successfully contributes to the overall positive client experience. In conjunction with the Senior Client Support Specialist (“SCSS”), the CSS effectively supports clients through answering enquiries and contributes to continual process improvement. The CSS supports the completion of daily, weekly and monthly transaction processing and reporting for all of the MFA program offerings.



SCOPE

The CSS and the SCSS are jointly responsible for process support, both internally and for clients. The role completes a variety of data entry tasks, as well as providing program support for client transactions, inquiries, payment processing, and administration. The CSS contributes to an efficient, effective team and a smooth-running office, and supports the team in the coordination, preparation, and delivery of services to MFA clients, staff, and stakeholders.



DELIVERABLES

CLIENT PROGRAM SUPPORT

- Performs daily, weekly and monthly activities to support the Pooled Investment and Pooled High Interest Savings Account Programs
- Performs daily, weekly and monthly activities to support the Short-Term Financing and Equipment Financing Programs
- Assists clients with all loan financing and investment transactions and enquiries
- Supports clients by assisting with website access, responding to enquiries, and processing requested updates to client profile information
- Works with Financial Institutions to facilitate timely payments
- Remains informed and current on appropriate legislation
- Remains informed on current investment practices to support client enquiries

INTERNAL SUPPORT

- Prepares reports as directed by management
- Participates in social media and marketing activities as needed
- Participates in ad-hoc project work as required
- Creates schedule for review of invoices on active long term (debenture) loan
- Verifies invoicing amount to source documents to ensure accurate collection of long term loan payments
- Electronically collects tax levy payments from municipalities and the Surveyor of Taxes



ROLE-SPECIFIC SKILLS AND KNOWLEDGE

SKILLS

- Communication – well-spoken, articulate and writes effectively
- Organizational and time management – manages and prioritizes workload to meet tight deadlines
- Attention to detail and accuracy - performs timely, accurate work in all aspects of supporting MFA staff
- Collaboration – works effectively with clients, stakeholders and MFA staff
- Proactive – anticipates needs and proactively solves problems, takes action/makes suggestions
- Adaptability and flexibility – easily shifts direction and adapts to changing priorities

KNOWLEDGE

- Accounting practices and general principles
- Understanding of the financial environment, terms, and practices
- Computer savvy and able to learn quickly
- Experience in corporate banking with an understanding of EFT/wire processes
- Awareness of the various Acts that govern MFA, the Municipalities, Regional Districts, Regional Hospital Districts, School Districts



SUPERVISORY RESPONSIBILITIES

- The Client Services Representative does not have supervisory responsibilities.



STAKEHOLDER RELATIONSHIPS

- MFA staff – works collaboratively to support client facing programs and supports the finance staff in completing routine operations
- Clients and stakeholders – process client transactions and answer enquiries in a timely fashion
- Financial Institutions - corporate banking procedures and electronic fund transfer and/or wire problems
- CIBC Mellon – works collaboratively to ensure smooth transactions and solve problems during tight deadlines
- Other third-party service providers – reviews, reports and collaborates to solve problems



EDUCATION AND EXPERIENCE

- A minimum of 2 years' experience in a client support role in a service-orientated environment
- Previous experience working in banking is an asset
- Degree, diploma or certificate in business
- Bookkeeping experience is an asset



ORGANIZATIONAL COMPETENCIES

LEADERSHIP

The MFA's success is built on their credibility and strong reputation amongst its stakeholders, garnered through their demonstrated leadership skills. The MFA team members exhibit leadership by promoting the organization's mission and vision with character, an open-minded, positive, can-do attitude, and approachability. Team members are aware of themselves and others and understand the impact of their actions. They have a strong presence and demonstrate confidence and capability. They are flexible and are able to adapt quickly to changing priorities, are resilient and are able to calmly and confidently deal with setbacks.

COMMUNICATION

MFA team members are strong communicators. They are approachable and professional in their dealings with other team members and external stakeholders. They are able to educate and speak articulately about the functions of the MFA and they demonstrate strong written and verbal skills. They can take complex information and make it simple and accessible. MFA team members are effective listeners and understand the content and context of communication and discern what to share, when to share it, and with whom, as well as the appropriate method for the communication.

RELATIONSHIP-BUILDING

Relationship building is a cornerstone of MFA's success. Team members' relationships with external stakeholders establish and uphold MFA's credibility and reputation. Internally, team members build constructive working relationships by being supportive and by assisting team members when necessary. They seek first to understand and take the time to listen and talk through issues when they arise. They are respectful and approachable. Externally, MFA team members build trust through ethical work practices, honesty and openness. They achieve results and demonstrate integrity by doing what they say they will do, and building strong loyalty among both internal and external stakeholders.

TEAMWORK AND COOPERATION

The MFA relies on a strong, collaborative team for its success. MFA team members are engaged in their work with the team, and participate with energy and enthusiasm. They are inclusive in their dealings with other team members, ensuring appropriate sharing of knowledge and information. They demonstrate a willingness to step in and help other team members when needed and have each other's backs, supporting and giving grace when necessary. They effectively and quickly resolve conflicts with other team members and choose appropriate interactions when doing so. They know and support one another's work and deliverables and acknowledge and celebrate each other's successes and achievements.

RELIABILITY

MFA team members can be relied on at both the individual and organizational level. They provide accurate, ethical, reliable outputs to each other and external stakeholders so that they can make informed decisions and take appropriate risks. They provide timely, accurate analysis and assessment and demonstrate consistency in their work outputs both internally, and externally.



QUALITY AND PROFESSIONALISM

The MFA has an exceptionally strong reputation in the marketplace and insists on a high standard of quality. Team members meet these high standards despite tight deadlines and complex requirements. They are committed to quality work and produce excellent results. They exemplify professionalism in all interactions with others, both internally and externally.

STRATEGIC THINKING

Strategic thinking is essential to team members' success at MFA. Team members understand the big picture of the organization's mission and vision and its impact in the marketplace, as well as the impact of his or her specific job role within the organization. They are discerning, and can be counted on to effectively solve problems and make good decisions. They express an ongoing interest in things, externally, that relate to their role. They stay current with the industry, marketplace and economic events and can communicate with stakeholders intelligently and knowledgeably.

ACCOUNTABILITY

MFA team members are accountable and take responsibility for their actions, owning mistakes and demonstrating initiative to solve problems. They step up and take on challenges when necessary. They follow through on commitments.

INITIATIVE

The MFA team is collaborative and requires team members to demonstrate initiative in their own roles. MFA team members are not passive – they constantly scan the internal and external environment and anticipate where they can be useful and effective, and take action accordingly. They are always on the lookout for more effective work processes and make constructive suggestions for improvements. They are prepared when opportunities arise and act without being prompted.

CONTINUOUS IMPROVEMENT

Industry and job knowledge are essential to job effectiveness. MFA team members stay current with the industry and marketplace and are consistently looking for ways to improve the way MFA does business. Creativity and innovation are encouraged and team members think in terms of desired outcomes, not just reactive, quick solutions. They strive to improve in their job outputs by seeking opportunities to increase knowledge and develop skill, personally and professionally, through both formal and informal means.