

Client Support Manager

Smartleaf seeks to hire a Client Support Manager to oversee the implementation and ongoing support of our portfolio management application. This is a key role reporting directly to the VP of Operations, with exposure to top management and a high level of interaction with Smartleaf's technical and sales staff.

What We Do

Smartleaf is changing the way private wealth is managed. Our hosted service generates daily trade recommendations used to manage over \$50 billion in assets across more than 50,000 accounts belonging to individual investors (e.g., your neighbor, you, your parents). We are privately owned, profitable, and growing rapidly.

We help service individual accounts through our clients, who are typically wealth managers at bank trusts, registered investment advisors, and broker/dealers. We are a small team of dedicated visionaries and engineers. By automating much of what is involved in wealth management, we are making it possible for ordinary investors to receive a level of wealth management that was once the exclusive preserve of the ultra wealthy investor. We have stubbornly worked toward moving the needle of what a single individual can expect in wealth management.

We do not have a trading floor. We do not dress in suits. We are not part of mainstream finance, but hope to change the norm of what finance means to the individual investor — this is at the very core of our group DNA.

Who We Are

Smartleaf is made up of entrepreneurially minded people of diverse backgrounds and experience levels. The technical team and board include a principal author of the original Apache server, former members of the MIT Artificial Intelligence Lab, and Harvard Business School professors, to name a few. Our broad mix of backgrounds and experience allows us to keep our service both stable and innovative.

Our alumni have gone on to do great things, both as academics and entrepreneurs.

Qualifications

The ideal candidate has previously provided support and/or training for financial services applications (ideally web based), and has practical project management experience.

Other, more general requirements include:

- Bachelor's degree or equivalent experience in a customer-facing role
- Demonstrated organizational ability
- Strong interpersonal skills and the desire to work with clients
- Passion for being part of a hard-working team
- Ability to work independently
- Ability to multitask in a fast-paced environment
- Strong active listening skills and customer service skills
- Strong attention to detail when communicating with customers (both verbal and written)

The Work

Smartleaf clients include strategic partners and end-user firms in the financial services industry. In this role, you will be the point of contact for our client firms' subject matter experts (who serve as the initial point of contact for the majority of our end users). In assessing and resolving end-user and partner questions, you will work to ensure that our core team continues to deliver world-class support to Smartleaf's dynamic and growing customer base.

The Client Support Manager will also serve as a project manager for new implementations of Smartleaf. You will be the primary contact for the client throughout their implementation, and will ensure that the implementation is completed on time and with the least amount of disruption to both Smartleaf and the client. In this role, you will coordinate the activities of other Smartleaf employees as needed and be responsible for tracking and reporting on the progress of the implementation against the project plan.

Specific responsibilities include:

- Becoming a subject matter expert on the Smartleaf application, in order to provide support internally and externally
- Training client and partner subject matter experts on the use of the application
- Collaborating with other technical support team members to properly manage customer inquiries
- Gathering the information required to best handle customer application and technical inquiries.
- Identifying and helping to resolve user problems/bugs with R&D support
- Owning client issues from beginning to end
- Managing customer expectations regarding estimated response times for issue resolution
- Pulling in resources, such as other team members and engineers to solve difficult/complex issues
- Reaching out, proactively, to clients and partners to provide ongoing feedback to optimize the Smartleaf user experience
- Acting as a client advocate for product enhancements, new functionality, and development priorities

The Firm

Founded in 1999, Smartleaf is still small in numbers and privately held. We are located directly above the Kendall Square T stop, in a sunny, seventh-floor office. In addition to competitive compensation, Smartleaf employees receive comprehensive health and dental coverage, three weeks paid time off, flexible work hours, ISOs, free food, and an espresso machine better than most coffee houses' (almost like it's 1999).

How to Apply

Send your resume and a brief cover letter to jobs@smartleaf.com

Smartleaf is an Equal Opportunity Employer.

To all recruitment agencies: Smartleaf does not accept agency resumes. Please do not forward resumes to our jobs alias, Smartleaf employees, or any other company location. Smartleaf is not responsible for any fees related to unsolicited resumes.