



Onboarding Specialist Job Description

Job Title: Onboarding Specialist

Department: Customer Success Team

Reports To: Director of Customer Success

Supervisory Responsibility: No

Employment Status: At-Will

The Role

CredHub is looking for an **Onboarding Specialist** to work with new and existing clients to ensure the successful implementation of setting up a customer accounts in CredHub and with the credit bureaus. This person will possess an attention to detail, coordinate an onboarding checklist and develop strong rapport to effectively execute onboarding. As a member of the Customer Success team, this person is the first point of contact in customers' post-sales experience and are responsible for ensuring excellent client satisfaction with the onboarding process.

Essential Functions

- Coordinate internal and external resources for successful execution of onboarding new customers.
- Liaise with the sales team during the Sale-to-Services transition and lead the Services-to-Support transition.
- Effectively communicate onboarding expectations and progress to customers, team members, and executive team in a clear and timely manner.
- Manages documentation and customers PII in systems during set up in CredHub system and credit bureau connection.
- Follow established policies, procedures, and workflows outlined for successful implementations.
- Conduct customer workflow reviews, define project scope and objectives, ensure all relevant stakeholders are involved in planning, and proactively identify potential technical limitations issues with customers' requirements.
- Improve processes by enhancing best practices and proactively identifying areas of improvement.
- Contribute to ongoing internal content creation, documentation, and audits.
- Work in and keep Salesforce updated to manage customer onboarding and client record accuracy.

Additional Functions

- Participate in ongoing training and education, provided by CredHub
- Perform other duties as required.

Job Specifications

- Must be 18 years of age.
- Have 1-2 years of successful customer facing administration role.
- Goal driven and results oriented.
- Ability to work in both team and individual environments.
- Excellent organization and communication skills
- Superior listening skills and problem-solving skills
- Advanced understanding of core business concepts



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- Strong command of Microsoft Office
- Experience with Salesforce
- Better than average writing skills
- Ability to work in an autonomous environment where you can be a self-directed, independent worker.
- Ability to create an inclusive workplace where everyone feels a sense of belonging by empowering all our employees to speak up, ask questions, and been seen.
- Ability to adapt and prioritize as needed.

The Legal Stuff

CredHub is committed to diversity, equity, and inclusion (DEI). We foster an environment that encourages different perspectives and values each team member's individual experiences. The incumbent will receive consideration for employment without regard to sex, gender identity, sexual orientation, race, color, religion, national origin, disability, protected Veteran status, age, or any other characteristic protected by applicable law.

The incumbent must be able to perform the essential functions satisfactorily with or without reasonable accommodation. The above statements are intended to describe the general nature and level of work being assigned to this job. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of individuals in the job. This job description is not an employment agreement or an expressed or implied employment contract. Management has the exclusive right to alter this job description at any time without notice.

I have received a copy of my Job Description and understand what is expected of me.

Printed Name

Signature

Date