



TrustBridge  
global

MAKING  
GLOBAL  
GIVING  
EASY



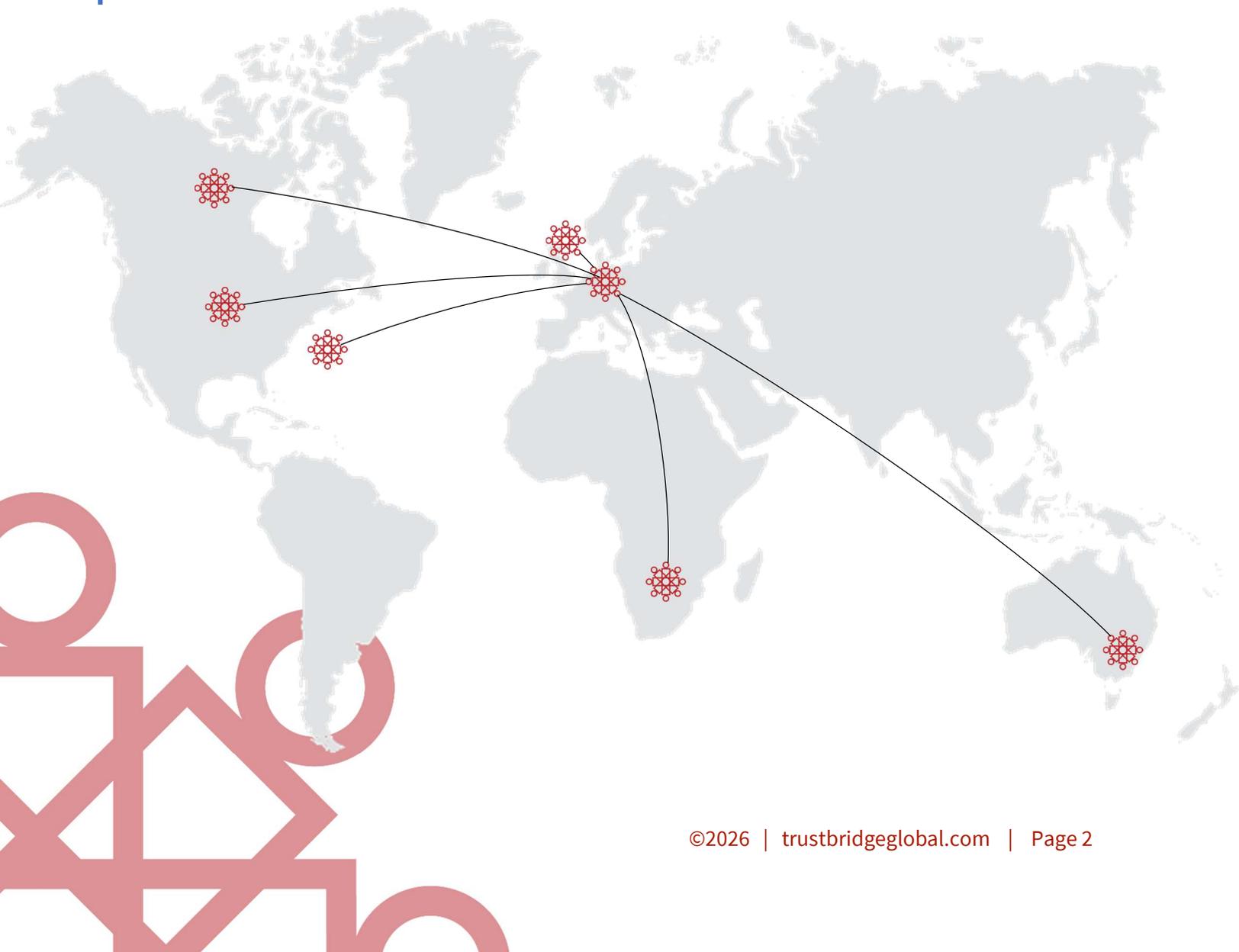
MAKE YOUR  
IMPACT ON  
THE WORLD

Client Success Specialist

TrustBridge Global Foundation is a grant-making foundation based in Switzerland. We receive donations from individuals and entities all over the world and process and send grants to charities almost anywhere.

OUR MISSION IS TO **MOBILISE RESOURCES**  
BY **MAKING GLOBAL GIVING EASY.**

WE DO THIS BY CREATING A **GLOBAL**  
**NETWORK OF GENEROUS COMMUNITIES.**



Imagine anybody giving to any charity anywhere with just a few clicks. We believe that radically improving cross-border giving will change the world.

OUR VISION IS THAT **CHARITIES EVERYWHERE** HAVE ALL THEY NEED TO **ACCOMPLISH THEIR MISSION.**



There are trillions of dollars, euros, and yen in the hands of generous people around the world, more than enough to make a significant difference in the lives of people around the world – TrustBridge will get those resources moving.





### ***Put People First***

The world tells us that we need to decide between benefiting ourselves or benefiting others. In all situations, we will choose to apply the Golden Rule and treat others as we would like to be treated. We put people first and lean into generosity. People are more important than dollars.

### ***Trust Our People to Act***

We believe in our people – their gifts, skills, and worth – and therefore we trust our people. We are self-starters and take action without waiting to be told. But not necessarily on our own – we listen and collaborate. We provide everyone with the training, strategic clarity, and radical information sharing necessary to make wise decisions.

### ***Find a Way to Say Yes***

Our team is comprised of some of the smartest, most gifted people around. We believe our clients deserve maximum effort and creativity applied towards the accomplishment of their goals. While we always need to consider costs and potential risks, we should exhaust every reasonable alternative before we say “no, we can’t do it”.

### ***Move as Fast as Possible, but Not Faster***

In serving clients, time is of the essence. Non-profit charities should not operate at a lower standard than for-profit businesses. We strive for world-class responsiveness to client needs, while not compromising compliance with applicable laws and regulations, or our standard of excellence. Additionally, as we innovate, we move those solutions into production with real world urgency.

TrustBridge maintains a globally distributed workforce with team members in Switzerland, the United States, India, Malaysia, the Philippines and more.

## THE FOLLOWING OPPORTUNITY IS FOR A **CLIENT SUCCESS SPECIALIST** WITH A FOCUSED SET OF RESPONSIBILITIES.

### DESIRED OUTCOMES

Someone excelling in this role will:

- Ensure TrustBridge's donor and charity clients are delighted with their service, so that all operations run smoothly, efficiently, and effectively within a rapid growth environment organization
- Provide excellent post-Charity Fund approval follow-up and ongoing support to our active charity clients and their supporters
- Become knowledgeable about the entire product portfolio and technical aspects of how TrustBridge can serve a wide range of international clients and be able to communicate these products and services with confidence and efficacy
- Serve all donor and charity clients through effective communication, making sure that issues and needs are addressed in a timely manner and appropriate solutions conveyed with a high level of client satisfaction
- Successfully undertake support and cross training with the rest of the Giver Services team so that the donor and charity experience from initial contact to Charity Fund realization and beyond to ensure valuable and pleasant customer service experience and client retention
- Keep our systems and databases organized and up to date
- Effectively manage workflow handoffs within the Giver Services Team

## JOB SUMMARY

The **Client Success Specialist** reports directly to one of the Giver Services Managers on the operations team and works in a small team which includes the Product Specialist and the Due Diligence and Compliance Success Specialist. This position has three broad areas of responsibility:

- To support the Giver Services Team with post-approval follow-up and ongoing support to our Foundation Fund and active Charity Clients and their supporters through the provision of training and communication on fund features and making the most of their Funds with TrustBridge
- To serve our donor and charity clients as an expert in GivingSpace and the TrustBridge client Portal, new campaigns, product offerings to both our Foundation Fund and Charity Fund holders, and new product roll outs
- To engage the team in feedback and process improvement initiatives, manage workflow handoffs to other members of the Giver Services Team, and become knowledgeable about the other positions of the team for greater overall team success and coverage

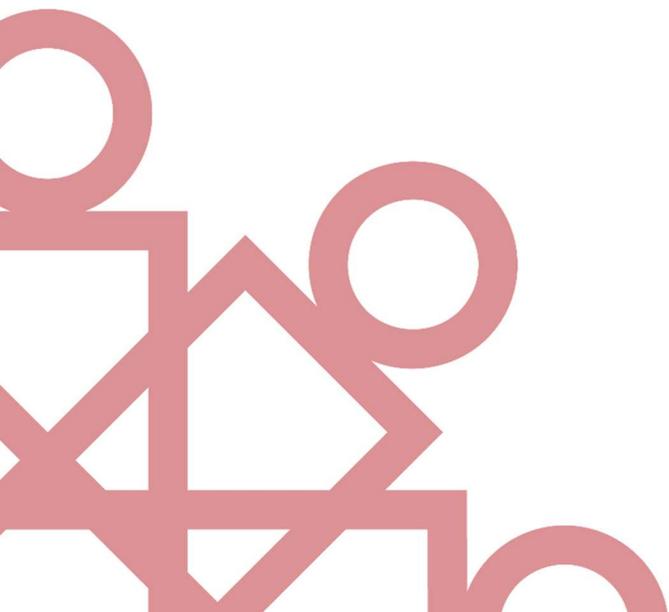
## EDUCATION, TRAINING, AND EXPERIENCE

- Spiritually mature with a strong calling to this role
- Bachelor's degree in Business Administration or equivalent experience
- Experience in CRM systems including sales pipeline management
- Experience in working virtually or with a dispersed team
- Demonstrated ability to maintain sensitive and confidential information
- Ability to manage multiple tasks and rapid change
- Excellent organizational skills with very strong attention to detail
- Team player with the ability to adapt to other roles to ensure team success
- High Emotional Intelligence
- Proficiency in Microsoft Office Products and the ability to learn new technology platforms quickly
- Flexibility and effective time management
- Strong growth mindset
- Desire to see our donor and charity clients utilize the TrustBridge tools successfully
- Superb verbal and written English communication skills, as well as great phone/video etiquette
- Cultural competency and sensitivity in dealing with donors and charities around the world

## WORK ENVIRONMENT AND MENTAL REQUIREMENTS

- Regular workdays run from roughly 1600 – 0100 (PH Time) to maximize the overlap with European and US Eastern Time work hours (time spent outside regular work hours will be offset against regular workdays)
- Ability to communicate and exchange information, collect, compile, and prepare work documents, as well as set up and maintain work files
- Willingness to work more than 8 hours per day, as needed; ability to handle pressure during peak periods during the year, availability to handle issues outside of normal working hours
- Benefits include paid time off, paid holidays, employer contributions to health insurance, and annual bonus. Future retirement benefits are anticipated

Contact ([recruiting@trustbridgeglobal.com](mailto:recruiting@trustbridgeglobal.com)) to find out more.



A photograph of a sharp, snow-capped mountain peak against a blue sky with scattered white clouds. The mountain is the central focus, with its peak reaching towards the top of the frame.

GIVING | IMPACT | GLOBAL