



FIVE STONE

Tax Advisers

PROTECT | PRESERVE | PREPARE

Client Services Administrator

Department: Operations

Reports To: Client Services Manager

Employment Type: Full-Time | Hybrid

Position Summary

The Client Services Administrator serves as the first point of contact for clients, providing exceptional customer service through efficient communication, problem-solving, and coordination across all departments. This role supports multiple lines of business—including Income Tax, Property Tax, and Tax Resolution—ensuring clients receive timely, accurate, and professional responses while maintaining organized, well-documented client records.

The ideal candidate is highly organized, detail-oriented, and thrives in a collaborative environment. They demonstrate a strong understanding of customer relationship management, workflow tools, and communication best practices.

Core Purpose

To deliver an exceptional client experience through proactive communication, attention to detail, and seamless coordination between departments.

Your “One Thing”

Wow the client with quick, clear, and concise communication.

Core Responsibilities

- Serve as the primary point of contact for inbound client inquiries via phone, email, and mail.
- Welcome clients with warmth and professionalism to foster a positive, inviting atmosphere.
- Uphold a polished, business-appropriate appearance to ensure an excellent first impression.
- Manage and route client communications to the appropriate department or team member.
- Maintain accurate and timely documentation in HubSpot, ensuring all client touchpoints are recorded.
- Process all mail and faxes on the same day they are received.
- Coordinate scheduling and administrative support across departments as needed.
- Support client onboarding, file updates, and follow-ups to ensure a seamless experience.
- Monitor service metrics such as call volume, response times, and client satisfaction.
- Contribute to department process improvements and cross-departmental communication.

Daily Expectations

- Maintain a call abandonment rate below 5% with no refused calls.
- Respond to all client communications within 24 business hours.
- Process all faxes and mail on the day they are received.
- Keep HubSpot accurate and up to date for all client communications.



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Short-Term Goals

- Receive at least one positive online client review per month (e.g., Google or NPS).
- Become proficient in HubSpot CRM and understand how to best leverage it for client communication.
- Become proficient in Microsoft Office 365 tools for scheduling and documentation.
- Develop strong time management and focused work habits to maintain productivity.

Long-Term Objectives

- Build confidence and understanding of property tax procedures and seasonal timeline.
- Expand knowledge of Five Stone's services across all departments to better support clients.
- Contribute to cross-departmental collaboration and process efficiency.
- Demonstrate leadership and ownership in client experience initiatives.

Qualifications

- 2+ years of experience in client services, administrative support, or a customer-facing role.
- Proficiency in Microsoft Office 365 and CRM tools (HubSpot preferred).
- Excellent written and verbal communication skills.
- Strong organizational and time management abilities.
- High attention to detail and accuracy in data entry and documentation.
- Ability to manage multiple priorities in a fast-paced environment.
- Professional, positive, and team-oriented attitude.

Core Values

Effectiveness • Professionalism • Selflessness • Commitment • Growth

These values guide every interaction and decision at Five Stone. They are not just what we do — they define who we are.