

Toniic

Position Description

Member Support Associate, Americas

About Toniic

Toniic is a non-profit global network of impact investors - investors seeking positive social and environmental impact alongside financial return. Our membership services team supports a global community of high net worth individual, family office, and foundation asset owners in more than 25 countries around the world who are active impact investors. Our field building initiatives provide impact investing resources to the public. The Toniic team of about 20 people is virtual, headquartered in San Francisco, California, USA, with team members located around the globe. Our culture is high performance and dynamic, requiring a tolerance for high bandwidth demands, an attitude of personal responsibility, proactivity and self awareness, and a highly collaborative approach.

About the Role

The Member Support Associate (“MSA”) supports the team of Member Engagement Managers (“MEMs”) in delivering an excellent member experience to impact investors. The emphasis is on activities and members in the Americas, in addition to and within the context of supporting the global organization to achieve its strategic objectives in member engagement and membership growth. The primary focus is to support the Americas MEMs in engaging members through virtual events, regular check-in meetings/calls, member connections, and tools/resources.

The MSA will be expected to perform a variety of tasks (on both administrative and systemic levels) in a well-organized and timely way. The MSA will need to act proactively, be highly responsive, member focused, understand the needs and characteristics of people with whom they work, and demonstrate good judgement on when to escalate issues to the senior team. A professional and friendly demeanor is critical for supporting our warm and welcoming culture.

Responsibilities

Member Engagement & Member Recruiting

- Support MEM in prospect outreach activities, including creating/maintaining prospecting materials and helping with prospect communications
- Prepare MEM for calls/meetings with members and prospects

- Onboard new members to online systems and provide troubleshooting
- Offboard members from online systems when members leave Toniic
- Follow up with members on outstanding items, such as payments, event registrations, requests and survey/data completions
- Maintain internal checklist of items to communicate with members

Events Management

- Support member events by developing and sending invitations, tracking registration and payments
- Support virtual event logistics, such as creating zoom links, tracking attendance, providing technical support, updating our event calendars, sending follow-up communications
- For regional in person events (conditions permitting), support the event lead with logistics, communications, promotional items, name tags

Member Operations & Accounting

- Maintain high data integrity for member & prospect information in Salesforce
- Track key performance indicators in Salesforce & report results to the team regularly
- Complete manual data entry tasks with attention to detail with a focus on future automation wherever possible
- Develop and run Salesforce reports to track and monitor key information for members and prospects
- Develop and document processes that maximize efficiency

Member Communications

- Develop and distribute centralized Toniic member and prospect communications / newsletter
- Manage newsletter vendor and maintain newsletter distribution list for members, prospects and partners
- Track and communicate newsletter open rates and other relevant metrics
- Format and distribute ad-hoc announcements to members

Required Skills & Characteristics

- Minimum of 2 years of experience in an internal or external customer support role
- College degree or equivalent professional experience
- High attention to detail

- A tolerance for high bandwidth demands
- Outstanding organizational and time management skills
- Ability to work virtually and flexible to work across global time zones
- Excellent verbal and written communications
- Professional demeanor & friendly/welcoming attitude

Highly Desirable Skills & Characteristics

- Experience with Salesforce, Google Suite, Asana, EventBrite, Mail Chimp, Vimeo
- Experience with virtual and in person event planning and logistics
- Knowledge of the financial services or investments fields with a focus on impact
- Interest in growing the impact investing ecosystem
- BIPOC candidates are highly encouraged to apply

General Information

Location: USA

Compensation: Exempt position, \$50-60K annual salary, commensurate with experience

Benefits: Four weeks of annual office closure in addition to three weeks of PTO annually, subsidized health insurance, 401k plan, and access to dental, life, accidental, and disability insurance.

Reports to: Member Engagement Director

To Apply

Send resume, cover letter, names and contact information for at least three references to apply@toniic.com by April 9, 2021 with the subject "Application for Toniic Member Support Associate"