



Adeptive Software Corporation

Job Title:	Expert Services Specialist	Job Category:	Software Implementation
Department/Group:	Implementation	Position Type:	Full-time
Location:	Superior, CO	Travel:	Yes (25-50%)

Job Description

ABOUT ADEPTIVE SOFTWARE

Adeptive is one of the leading software development companies in the title and escrow industry thanks to the continued adoption of our ResWare platform by agents and underwriters. Our software and the services we offer are focused on allowing customers to supercharge their business without having to change their approach. We believe technology is more than a tool, it should help an organization transform into the best version of itself.

We pride ourselves on a comfortable and supportive work environment of passionate and dedicated team members, many with 15-20 years of title industry knowledge and expertise. We offer competitive salary and benefits package and seek individuals who are looking for a meaningful career — not just their next job.

Our core values drive us:

- Gets it – smart and passionate learners,
- A healthy work-life balance – doesn't try to wring every last ounce of energy out of themselves or their teammates;
- Does the Right Thing – treats everyone with dignity and respect;
- Really Gives a Shit – a heartfelt dedication to helping our customers, team members, and community;

And we're dedicated to keeping it that way.

ABOUT THE ROLE

As an **expert services specialist**, you will have the responsibility for managing new clients' project implementations under the supervision of the director of expert services. The job function requires the ability to maintain customer satisfaction through proactive or responsive actions as needed. You must be able to coordinate projects/implementations by effective utilization of required resources to ensure on-time delivery. You must provide appropriate communication while working with multiple areas of the company (such as training, optimization, and support) along with the ability to document account requirements and implement assignments for new accounts.

The expert services specialist must be comfortable with customers of all sizes and business product offerings, assessing how the office operates, and helping the customer develop new processes where required.

You will prepare implementation materials and system documentation. The balance of your time will be spent assisting Adeptive staff when/where needed. The specialist will be responsible for organizing and conducting workgroup meetings throughout the implementation and post-go-live. The specialist must be capable of working with minimum supervision in performing assigned tasks. The specialist will be responsible for the overall success of the new client implementations.

Once the implementation process is complete, you will be responsible for communicating all findings and setup to the optimization and training specialist. You may be asked to prepare training materials and system documentation. This position may include business travel which typically occurs during the work week, and ranges from three-day to five-day trips; sometimes requiring multiple trips to a single customer location. Expect that up to 25% of the job will



be travel-related, with the remainder spent preparing for upcoming implementations, training events, and post-admin training calls. You should be comfortable working with and training groups of up to 30 people. Some technical experience and deep industry experience is required.

DUTIES AND RESPONSIBILITIES

- Manage and facilitate the successful execution of multiple project timelines and milestones
- Gather important information regarding workflow, documents, rates, clients/partners, etc.
- Adhere to implementation processes and accountable for project critical deadlines and tasks
- Develop and monitor implementation plan
- Collaborate with internal and external teams to facilitate the scheduling of the database build
- Accurately track all activities and their status
- Obtain final implementation sign-off and ensure customers are fully satisfied with project completion
- Seamlessly handoff newly implemented customers to the optimization and training Specialist
- Engage with customers in a timely manner and manage expectations
- Prepare internal work schedule and timelines with the customer and Adeptive training team
- Work with business associates/vendors on the implementation within their timelines
- Anticipate potential issues and proactively manages the details
- Regularly communicate project status and disseminate project information to the team
- Serve as a back-up to the training department to conduct training classes and specialized workshops for customers in all areas related to the use of ResWare; involve appropriate colleagues
- Support the strategic sales plan and marketing strategies outlined by management and the sale/marketing teams by conducting on-site and web-based implementation services
- Promote the image of the company by conducting yourself in a professional manner

JOB REQUIREMENTS

- Excellent organization and interpersonal skills
- Training experience
- Excellent verbal and written communication skills
- Strong technical skills
- Customer service experience
- Demonstrated ability to analyze problems/issues
- Ability to recommend alternative solutions
- Business process analysis experience
- Proven attention to detail
- Self-motivated
- Positive and infectious attitude
- Project management experience; ability to organize and prioritize multiple projects
- Knowledge of ResWare
- Real estate/title experience