



TAX ADVISORS GROUP

PROPERTY TAX | MINIMIZED

Client Relationship Manager – Dallas, TX

Role Description

The Client Relationship Manager (CRM) is responsible for maintaining a portfolio of clients that include some of the world's leading corporations. This position is instrumental in fostering long term client relationships and consistently articulates the value of TAG services. The CRM serves as the internal voice of the client while working with other TAG teams to exceed client expectations. This individual's performance is based on specific metrics associated with client on-boarding, expansion & retention. CRM's report to the Director of Client Services.

The team

Tax Advisors Group (TAG) provides personalized business personal property and real estate tax consultancy services to corporations nationwide, driving industry-leading results with the highest standard of client service. Serving 700+ companies with over \$18 billion in property assets across the country and a 95% client retention rate, we're proud to have been named one of America's Best Tax Firms by Forbes for 2022 and 2023. Originally focused on providing property tax solutions for Texas corporations, TAG has in recent years begun expanding offerings to include nationwide compliance and real estate services, leading to an overall period of growth and transformation for the company.

Now is an exciting time to join the #TAGteam as the company continues to expand and evolve! Here at TAG, we recognize that our people are our most valuable asset, and that's reflected in our approach to driving a fantastic work culture. We're focused on growing the business and leveraging that growth to carve out unique development opportunities for every person on the TAG team. With weekly catered lunches, regular social events in and outside the office, and an extended holiday break each December to disconnect and recharge, we really care about having fun while we work! To put it plainly – our goal is to be the #1 preferred employer in the property tax space.

The work you'll do

- As a Client Relationship Manager, you will have primary ownership and accountability for ensuring client advocacy and retention for complex clients who require higher touch service

Responsibilities Include

- Engage clients in strategy calls and remote/onsite, face to face visits as needed
- Identify and develop new opportunities for expanding client's footprint
- Monitor client health and create risk mitigation plans where needed
- Collaborate with other TAG teams and executive leadership to ensure positive client experiences and successful client renewals
- Resolve client inquiries by aligning clients with the right resources



- Be accountable for the retention of your client list along with maintaining an accurate forecast for in-year and future year performance
- Develop and share best practices with team members to continually improve the quality, effectiveness, and efficiency of TAG processes

Qualifications

- Experience owning, maintaining, and driving a client relationship in a quota or retention-carrying role
- 2-4 years of account management and/or property tax experience (college degree preferred)
- Excellent phone, written and verbal communication skills. Familiar with presenting strategy verbally in person, over the phone, and in email communication to internal & external customers
- Ability to multi-task and work independently and ability to prioritize and time manage for successful execution
- Must be able to take on multiple tasks while still maintaining accuracy and attention to detail

Preferred

- Bachelor in business administration, Marketing, or a related field
- Three or more years' experience in customer service, sales, or a related position
- Excellent verbal and written communication skills
- Ability to lead and work within a team
- Excellent conflict resolution and interpersonal skills and ability to build lasting relationships with clients
- Exceptional organization skills and a strong work ethic

Compensation

- Base salary commensurate with experience; individual may be eligible for discretionary performance bonuses
- Medical, Dental, Vision, Life and Disability Insurance; Employer contributes toward medical premiums.
- PTO time awarded based on years of employment (prorated first year based on start date)