

EQUITY SHIFT[®]

Job Title: Customer Support Team Leader

Location: Raleigh, NC

Classification: Full-Time

Company Description: Equity Shift is a trusted provider of next-generation fintech software that makes it easier for private companies to buy, sell, and transfer their securities. Our mission is to give operators (CEO, CFO, Counsel, etc.) enhanced capabilities at all stages of their company's lifecycle. Our vision is a private market where everyone has greater freedom of choice. Equity Shift's BITE[®] platform is patented and licensed by FINRA as a secondary trading marketplace for restricted securities, eliminating the complexity of private market operations by automating the entire process lifecycle. We're led by an expert team with 100+ years of relevant experience in software development, capital markets, corporate transactions, banking, and securities law. This is an opportunity to gain direct access to the world of private equity and work alongside leaders of the \$100B+ (and growing) annualized secondaries market.

At Equity Shift, we've cultivated a vibrant culture that values passion, curiosity, and collaboration. By fostering an environment of open communication and mutual respect, we harness the unique strengths of each team member to drive innovation and excellence. We take pride in our ability to deliver exceptional outcomes that drive our customers' success while nurturing the potential of every individual involved.

Job Description: The Operations team at Equity Shift is responsible for owning, managing, and supporting the success of our direct customers (private companies). The Customer Care team works closely with new customers to ensure that their adoption of Equity Shift is indicative of a world-class service experience. Ideal candidates will demonstrate the ability to quickly and effortlessly conduct customer due diligence (KYC) and data integration with a high level of financial acumen. The

Customer Support Team Leader will be responsible for ensuring the accuracy of customer information and readiness to conduct private equity transactions.

Key Responsibilities

Team Leadership

- Supervise, mentor, and support a team of customer support agents.
- Conduct regular team meetings to share updates, discuss challenges, and recognize achievements.
- Set clear performance expectations and ensure accountability.

Customer Service Excellence

- Assist customers through the onboarding process, ensuring accuracy in legal due diligence and KYC.
- Monitor and maintain high-quality customer interactions across all channels.
- Handle escalated customer issues and complaints, providing timely and effective resolutions.

Operations and Onboarding

- Perform legal due diligence of new customers and owners.
- Ensure the accurate setup of new customer environments.
- Assist customers with securities transactions and other corporate events.

Software Adoption

- Understand, demonstrate, and prescribe software features to customers.
- Collaborate with internal teams to refine workflows and enhance the customer experience.

Performance Management

- Track and analyze team performance metrics (e.g., response times, resolution rates, CSAT scores).
- Provide constructive feedback through regular one-on-one coaching sessions.
- Identify skill gaps and coordinate training to improve team capabilities.

Reporting and Communication

- Prepare and present reports on team performance and key metrics to management.
- Maintain open communication with upper management about challenges, successes, and needs.

Qualifications and Skills

- Critical thinking: Ability to listen, ask relevant questions, and solve problems.
- Excellent decision-making and leadership capabilities.
- Self-starter attitude with the ability to work productively with little formal guidance.
- Excellent presentation, communication, and relationship-building skills.
 - Ability to communicate and collaborate effectively with a variety of internal and external stakeholders, across a wide spectrum of experience with the concepts and practical application of private finance, technology, and securities regulation.
- Highly organized with the ability to maintain simultaneous work streams.

Desired Education and Experience

- Bachelor's degree required.
- 5+ years of experience delivering SaaS software to enterprise customers.
- Experience with private companies and corporate transactions preferred.
- Proven track record of positive customer experiences.
- FINRA licensing required within 90 days of employment.

What We Offer (Compensation)

- Market-competitive base salary and company ownership
- Flexible working hours
- Competitive vacation and holiday schedule
- Full employee healthcare benefits

Interested candidates are invited to submit their resume and a cover letter detailing their qualifications and leadership experience to careers@equityshift.com.