Roles & Responsabilities

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1. Leadership & Decision Making

1. Who leads the company overall?

> The CEO leads Financial Recovery Strategies (FRS) and provides strategic direction.

2. Who drives business strategy and priority setting?
   The CEO and COO drive business strategy and priority.

2. Core Business Functions

3. What are the main departments or teams (e.g., Sales, Marketing, Operations, Finance, Customer Service)?

> There are two divisions, Class Actions (FRS) and Unclaimed Property (FRSUP).
>
> Teams within Class Actions division:

- Sales
  - Sales main responsibility is to sell settlements to prospects/leads and to cross sell existing clients on new settlements.
  - Key tools used by Sales are: Salesforce, Outlook, Teams and ZoomInfo.
- Relationship Managers (RM)
  - RMs' main responsibility is to collect data from clients and resolve any questions the Processing team has about the data and resolve any questions the client has about their claim's status.
  - Key tools used by RMs are: Salesforce, Outlook, Teams, Excel.
  - Recurring frustrations are: lack of client engagement and a crushing workload.
- Marketing
  - Marketing's responsibilities include facilitating email and social media campaigns, sourcing leads, and developing marketing materials. They are also responsible for maintaining the website.
  - Key tools used by Marketing are: Salesforce, InDesign, Form Assembly, and Salesforce Marketing Cloud
- Processing
  - Processing's responsibilities include filing claims for FRS's clients, processing client data, resolving any

deficiencies or audits, and processing settlement payments.

    - Key tools used by Processing are: Salesforce, Excel, Outlook, RingCentral, Adobe Acrobat, and Teams.
    - Recurring frustrations for the Processing team are: RMs collecting data at the last minute, Sales selling settlements to clients who are ineligible to participate, the Client Information Record (CIR) process, and manually processing large amounts of data by hand.

- Quality Assurance (QA)
    - QA's responsibilities include: reviewing Processing's work and proofreading written material (social media posts, emails, etc.) from other departments.
    - Key tools used by QA are: Salesforce, Excel, Outlook, RingCentral and Teams.
    - Recurring frustrations for QA are: people submitting work without checking it first and being pressed for time since they are usually the final step in the process.
- Information Technology (IT)
    - IT is responsible for maintaining all systems, cybersecurity, and assisting teams with bulk activities, such as mass upload/updates.
    - Key tools used by IT include: Salesforce, Snowflake, DemandToolsV, Azure Admin Portal, KnowBe4, Jitterbit, Make, n8n, etc.
    - Recurring frustrations for IT are: assisting with processes or issues that individuals should be able to resolve on their own and the inconsistent approaches to problems which prevents IT from automating a solution.
- Finance
    - Finance is responsible for FRS's finances, including paying vendors, effecting deposits, and paying the clients their money - less FRS's fee.
    - Key tools used by Finance are: Outlook and Quickbooks Desktop. They also use Insperity, an outside benefits manager to manage payroll and benefits.
- Legal
    - Legal is responsible for representing FRS's legal interests and fighting for the best treatment of our clients' claims.
    - Key tools used by Legal are: Outlook, Word, Excel, and Law360.
- Research
    - Research is responsible for monitoring the courts' dockets, locating new settlements for FRS to sell, and staying current on existing settlements.
    - Key tools used by Research include: PACER, Outlook, Word, Salesforce, and Law360.
    - Recurring frustrations for Research include the time-consuming task of creating and maintaining settlement summaries and keeping up with a large volume of incoming information.

> Teams within Unclaimed Property division (FRSUP):

- Research
    - Research is responsible for locating unclaimed property held by various state and local agencies in escheatment, either belonging to our clients or significant enough to be used in prospecting new clients.
    - Key tools used by Research are: Salesforce, an outside webscraper (Dexi/Mozenda), Excel, Outlook, Teams.
    - Recurring frustrations include: the amount of bad records that need to be reviewed before finding those relevant for our clients.
- Processing
    - Processing is responsible for gathering data from the client, submitting claims, and following up with the appropriate agency until the claim is resolved and payment is received.
    - Key tools used by Processing include: Salesforce, Outlook, Excel, Teams, and Adobe Acrobat, various agency websites.

3. IT & Technical

5. Who handles IT systems day-to-day?

> The System Administrator handles our in-house devices. Our Director of Salesforce handles everything with Salesforce.

6. Who owns data quality and reporting?

> The Director of Salesforce owns building reports and the QA Manager owns quality.

7. Who approves security or compliance-related changes?

> Our security and compliance is addressed by a 3-person committee which includes: COO, CIO, and General Counsel.

4. External & Client-Facing

8. Who manages relationships with clients/customers?

> Within the Class Action Division, client relationships are managed by a 2-person team that includes the Relationship Manager (RM) and the Sales Manager (SM).
>
> Within the Unclaimed Property Division, client relationships are managed by the Processing team.

9. Who oversees contracts, legal, and compliance from the business side?

> General Counsel and the Assistant General Counsel oversee all contracts.

5. Vocabulary & Roles in Practice

10. Are there any **role names, team nicknames, or internal terms** I should know so I can speak your language?

> Client Information Record (CIR): a corporate hierarchy, a collection of a client's locations, subsidiaries, and parent companies. May include names, addresses, and FEINs. This term is frequently used in reference to a single location or may be used to address the entire hierarchy.
>
> Claims Administrator (CA): The court appointed company that will execute the settlement, which includes notice to the class, processing claims, addressing deficiencies and audits, and distributing payments. Other common synonyms are Settlement Administrator and Notice Administrator.
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> Account Manager: a legacy role name still used in some systems, now referred to as Relationship Manager.
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> InfoBeans-SFDC: An external team of developers from InfoBeans, an Indian Salesforce consulting company, that handles our custom development within Salesforce (SFDC).
>
> InfoBeans-MC: An external team of developers from InfoBeans, an Indian Salesforce consulting company, that handles our custom development within Salesforce Marketing Cloud (MC).

11. Are there roles that **don't fit standard titles** but are important in how the company works?

> Chief Relationship Officer (CRO): This role manages all our outside sales partners (or referral partners). Clients won through a referral partner are assigned an internal Sales Manager and Relationship Manager who will communicate with the client going forward. The CRO is also responsible for finding new partnerships such as, industry associations, new referral partners, etc.
>
> Chief Administrative Officer (CAO): This role performs Human Resources (HR) responsibilities.