

# Job Description: Customer Experience Coordinator

**Job Title:** Customer Experience Coordinator

**Department:** Sales

**Pay Scale:** \$10-\$14 per hour

**FLSA Status:** Non-Exempt

**Work Hours:** 8:00am to 5:0pm, Monday through Friday, some overtime

**Position Summary:** Assist sales department by overseeing day to day scheduling operations and ensure jobs are ready for installation. Assist clients with financing needs. Responsible for the creation of department job files, contacting customers regarding scheduling issues. Responsible for coordinating communication between sales, installers, field supervisors, customers, vendors and the office.

**Reports to:** Sales Manager

## Required Qualifications:

- Advanced customer service skills.
- Consumer finance experience
- Ability to multi-task
- Organized
- Geographical knowledge of sales area or map reading skills
- High school diploma or general education degree (GED)
- Two years related experience and/or training in customer service and/or project management or equivalent combination of education and experience

## Desired Qualifications:

- Excellent verbal skills
- Professional phone skills
- Strong interpersonal skills
- Working knowledge of GPS and mapping software
- Energetic personality
- Well organized and ability to work independently
- Consumer Financing experience
- Consumer sales experience

## Essential Functions and Responsibilities:

- Receive incoming requests for sales and prep sales staff for success
- Update and maintain schedule board with all sold jobs, communicate scheduling issues with other departments including sales.
- Check paperwork and timecard from previous day's job, schedule any punch lists or uncompleted items.
- Create all job packets.
- Return customer calls in a timely manner, resolving open issues in a fast/efficient manner etc.
- Assist H.S.A. in closing jobs through phone calls, discussion and showroom assistance.
- Process all sales related packet information daily - job progression form to be completely filled out.
- Coordinate with vendors as needed regarding returns, warranty, delivery, etc.
- Return overage stock to vendors, write PO and have material set out for pick up by vendor.
- Complete paperwork for job costing, orders received etc and send to Accounting.
- Schedule layouts, update layout & design schedules - coordinate with Foreman/Installation Manager.
- Create any reports deemed necessary to track sales information.
- Maintain equipment pricing.
- Maintain literature inventory, presentation and stamping with company name & phone.
- Budgeting & tracking of advertising expense.
- Assist development of marketing, advertising and collateral creation of implementation.
- Assist Sales Manager

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- Process all finance documents & schedule with customer for signage.
- Provide assistance in completing job packets.
- Maintain daily / monthly commission totals, update daily.
- Act as a liaison between Customer & H.S.A.
- Happy call or thank you cards to the customer.
- Take service call requests as needed.
- Necessary back up on phones
- Weekly update to Satisfaction Survey, Customer name & address for jobs installed.
- Participate in weekly sales meetings.
- Maintain Web Site and respond to customer questions.
- Prepare weekly, monthly, yearly sales reports: Sales report, Lead Closing report, Lead source report, Maintenance Agreement Report.
- Resolve customer differences.
- Design & mail Customer thank you gifts.
- Additional duties as assigned

### Success Factors / Job Competencies:

- Reduce load on sales team through office support
- Increase sales through offering consumer financing.

### Physical Demands and Work Environment:

The physical demands and work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may enable individuals with disabilities to perform the essential functions.

#### Physical Demands:

- Use of all 5 senses, including closeup vision, distance vision.
- Ability to work in a sitting position in front of a computer screen for up to 8 hours per day.

#### Work Environment:

- Normal Office environment, with normal temperature exposure and lighting.

### Performance Indicators:

Certain key business indicators that will measure the effectiveness of the Installation Coordinator. These include the following:

- Number of jobs not forwarded to operations within one day due to incomplete or incorrect packet information for longer than one day.
- Number of payments held up as a result of not preparing finance documents timely or correctly.
- Timeliness in follow up with customer when job is complete, to be done within three days of installation.
- Timeliness of reports.
- Organization of dispatch of sales team.

I have received, reviewed and fully understand the job description for Plumber Apprentice. I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.

#### Signatures:

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_