



## **Job Description for Client Services Coordinator**

Job Title: Client Services Coordinator

Location: Richmond, Virginia, USA

### Job Summary

Interacts with prospective clients to provide information in response to inquiries regarding products and services. Provides administrative support for all levels of organizing staff to support the company in achievement of its strategic goals. Handles project management tasks that move the project forward, including: product procurement, coordinating services of professional partners, scheduling and staffing.

### Job Responsibilities and Accountabilities

- Acts as primary contact on behalf of the company for incoming business requests and client leads. Ensures lead follow up and tracking.
- Conducts client intake interview to determine needs and establish fit. Schedules Initial Assessment session, coordinating with client and Account Manager availability.
- Administers contact database, including client, prospect, and applicant information, preferred contractors, etc.
- Takes part in team and management meetings to assure project preparation and follow-through. Takes initiative on requests and inquiries of administrative nature. Updates and chases delegated tasks to ensure progress to deadlines.
- Requests Google reviews and conducts satisfaction interview with client to gather client's feedback on services received, solicit testimonials, and encourage referrals.
- Functions as the point person for all project planning and preparation.
- Works with the Account Manager to determine product and supplies needed for the project.
- Orders product and other necessary supplies through company trade accounts to be delivered to the client's home prior to the session date.
- Communicates with the Account Manager about availability of product, backordered product, and expected delivery date of product. Collaborates with Account Manager and Team Lead on solution strategies that will move the project forward to the client's satisfaction when desired product is not immediately available.
- Communicates to the client expected delivery date of product and number of deliveries.
- Processes unanticipated product needs that occur during a session, ordering product for pick up where appropriate and coordinating with the Account Manager or Team Lead to designate a team member to pick up product.
- Coordinates with the Account Manager to schedule professional partners or additional resources— such as hauling services— as needed for the project.
- Enters Projects into the company's CRM system. Attaches product receipts to corresponding Project and manages completion of tasks.

- Partners with Account Managers and Team Leads to manage job scheduling with attention to volume, client deadlines, and maximizing company's productivity levels. Ensures the accurate and timely communication of scheduling changes between the office, field staff, and clients.
- Coordinates staffing needs in advance of a session. Communicates staffing assignments to team members. Confirms job specifications with assigned team members. Provides ongoing innovation and guidance on best practices for adequate staff distribution and coverage that meets the demand of the company's work volume.
- Schedules a team member to make returns at the end of the session,, if needed.
- Communicates regularly with Leadership regarding problems or issues impacting production. Assesses workflow and helps to develop policies and procedures that improve efficiency.
- Assist Operations Manager with tasks as needed or as the role develops.

### Job Specifications

- Education: Bachelor's or associate degree in business, communication, or sales or equivalent work experience.

### Skills

- Strong organizational skills, orientation to detail and detailed work; strong interpersonal skills, customer service aptitude; clear and concise speaking and communications ability, writing skills, advanced computer literacy; arithmetic and numerical reasoning skills; responsible money-handling. Comfort/aptitude with selling and lead conversion. Ability to work well either alone or as part of a team.

### Experience

- Minimum of three (3) years in organizing, business, marketing/PR, office management, or other administrative role.
- Attributes preferred: Ability to plan/organize/direct/control projects; ability to deal with ambiguous/conflicting priorities or information; ability to influence people; verbal comprehension, problem solving. Ability to set and meet deadlines. Knowledge of the basic principles and practices of bookkeeping.

### On the Job Training

- Continued training in Abundance Organizing business systems, client intake interviews, and client care and retention strategies.

### Understanding and embodiment of Abundance Organizing's Core Values:

- We embrace the quirks that make us special.
- We act with resourcefulness and savvy.
- We conduct ourselves with an air of refinement, striving for the highest standards.
- We share our gifts whole-heartedly.
- We form meaningful connections.
- We radiate positive energy.
- We communicate with compassion

