



## Client Services and Office Support

Skills/Qualifications: Microsoft Excel and Word, Professional and Polite Communication Skills and Customer Correspondence, Superior Customer Service, Teamwork, Organization skills, Attention to Detail, Process Effectiveness, Valuable characteristics including Persuasive, Confident, and Honest. Clear growth potential for Employee excelling in aforementioned and further exuding Process and systems orientation, Computer and software adaptability, Analyzing Information, and Deadline Management.

### General Job Responsibilities:

- Answering Phones
- Superior Customer Service
  - Know JC Smith products and services.
  - Use positive language, be patient, helpful, and attentive to client needs.
- Communicating with your Team any client needs.
- Qualify new leads for our services following our documented process.
- Scheduling – Appointment Calendar with consideration of Participants schedule and route.
  - Qualified Client Meetings
  - Pre-construction Meetings
- Manage Job Status Excel database
  - Weekly meeting with managers to update Production statuses
  - Customer Management – Consultant Support
    - Track New Lead and all its relevant content.
      - Preferred method of Contact Information
      - Customer's Billing Information
      - Report on marketing lead resource.
      - Simple description of the project so the Consultant can be prepared.
- Data Entry – Quickbooks
  - Bills – A/P support
    - Assure that the Production has authorized the bills payment by proper job coding.
    - Track and follow up on bill issues
  - Signed Contracts – Sales, Create Estimates
  - Release Invoices – A/R support
- Contract Quality Control and Tracking
  - Follow check list. Make sure that the contract is complete following proper process, based on our format.
- General Requirements, not limited to:
  - Filing
  - Organizing
  - Office Manager assigned tasks
  - Keep work details confidential
  - Keep a neat and clean work space. Especially help maintain a clean foyer, conference room, and bathrooms.
  - Maintain a professional image for our customers, potential employees, and community visitors. Business casual dress is the standard for this dress code.