



JOB DESCRIPTION

Job Title:	Client Services Representative
Department / Cost Center:	Marketing and Business Development
Reports to (Job Title):	Manager Client Services
Job Grade:	
Location:	Various
Date Approved:	

<input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time	<input checked="" type="checkbox"/> Regular <input type="checkbox"/> Temporary	<input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt
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SUMMARY DESCRIPTION

State the overall function or purpose of the job.

This position is accountable for enrolling clients in various Klemmer workshops via telephone, e-mail or internet in support of Business Development and Marketing goals. This includes selling the program, providing program information, updating data bases, monitoring enrollments, payments and collections.

ESSENTIAL DUTIES AND RESPONSIBILITIES

List the major responsibilities of the job.

1. Enrolls clients/students to assigned program and ensure Klemmer meets established goal targets. Establish strong client relationships, value, and appreciation for Klemmer. Each Client Service Representative has one or more designated program(s) for which they are accountable.
2. Communicates via telephone and e-mail and provides course information, secures payments, ensuring payments are made as per agreement. Possibly provide payment plan with prior management approval or consistent with guidelines.
3. Populates data base with client information/conversations, on a weekly basis creates reports to communicate status of each class and projections for the respective class size.
4. Coordinates with Manager Administration and Logistics or designee to ensure hotels are located, contracts are signed and any contracted services are scheduled as required.
5. Estimates/calculates the anticipated number of clients available for upgrades to advanced workshops.
6. Depending on the program supported, the incumbent may be required to travel to the applicable workshop location to assist with logistics and registration.
7. For Upper Level classes, Youth Leadership class and/or Playful Mastery Contractor may perform

telesales activities with former participants to sell program upgrades, if applicable.

8. Work closely with assigned Program Managers and communicates updates, issues or other concerns to ensure the experience for clients is exceptional.

JOB KNOWLEDGE AND ABILITIES

State the demonstrated skills and job knowledge/abilities necessary to perform this position effectively

- Ability to multi-task and meet established deadlines and goals.
- Solid knowledge and application of client services skills.
- Superior telephone client service techniques; follow up skills.
- Problem analysis and problem resolution skills.
- Excellent interpersonal and communication skills; excellent listening and empathy skills.
- Proficiency in English, with excellent verbal and written communications and follow through skills.
- Ability to establish rapport and a trusting relationships via telephone/Zoom.
- Ability to deal effectively with customer concerns and apply conflict resolution techniques, if required.
- Detail oriented and able to produce accurate, timely reports as required.
- Commitment to excellence and high standards, including integrity and ethics.
- PC literate and proficient with required Microsoft Office Suite applications.
- Desire to receive feedback regarding personal job performance.
- Applying Klemmer tools personally.

EDUCATION AND EXPERIENCE

State both the minimum and the preferred educational attainment (or equivalent experience), and describe essential and desired subject matter, certifications, special training, etc.

- High School or equivalent certificate; post high school education preferred.
- Minimum 5 years related experience at a personal growth training organization or completion of Klemmer workshops plus one year customer service experience.
- Demonstrated track record of excellent performance and results.
- Excellent attendance record.
- Must minimally complete the Personal Mastery & Advanced Leadership workshops. Some individuals, depending on the position, may need to complete advanced workshops.
- Must staff Advanced Leadership every 12-18 months. This is educational time and is unpaid. Travel, lodging and travel meal expenses will be reimbursed by Klemmer.

WORK ENVIRONMENT / PHYSICAL DEMANDS

Describe the work environment characteristics that an employee encounters while performing the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform essential job functions.

- This position may require travel, primarily in North America.
- The work environment is primarily in at home requiring extended telephone and computer use.
- Sitting, standing, bending, stooping is frequent.
- Lifting of up to 30 pounds may occur occasionally.

CONTACTS

List the key positions, internal and external, with which the job incumbent must interact.

- Clients
- Internal Klemmer staff and Klemmer contractors

MANAGEMENT/SUPERVISORY RESPONSIBILITY

List the job titles that are directly supervised by this job, and the number. State the total number of job incumbents that this job supervises, both directly and through others.

None

This job description in no way states or implies that these are the only duties to be performed by the Contractor(s) incumbent in this position. Contractor(s) will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments.

A review of this position has excluded the marginal functions of the position that are incidental to the performance of fundamental job duties. All duties and responsibilities are essential job functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbent(s) will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities.

This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.