

## Position Description



**Position:** Client Services Coordinator

**Department:** Project Management

**Reports To:** Manager of Project Management

**Date Prepared:** 3/5

### Position Purpose:

The Client Services Coordinator is responsible for providing support to the Project Management Department. This support will be in the form of administrative duties related to the small-project order category of business which includes but is not limited to order entry, responding to emails/phone messages, creating install folders, and scheduling installation with customers. It may also include pricing & proposal generation, assistance with change orders, punch list, and warranty claims.

### Possible Growth Opportunities:

Project Manager

Sales Support Specialist

### Position Accountabilities & Performance Expectations:

- Establish and nurture positive relationships both internally and externally
- Consistently follow project life cycle checklist and provide support to Project Manager
- Maintain CRM, as required, to ensure Client information is accurate and complete
- Enter project prospects into CRM database and create project numbers
- Manage warranty claims and communication with internal service department and client
- Create, convert, and enter quotes to project order and issue POs to vendors
- Resolve acknowledgment discrepancies
- Manage the completion of install folders
- Schedule installation date with Install department and Client
- Verify product receipt in the warehouse or drop ship deliveries
- Monitor labor hours
- Manage change orders upon request for a deviation from the original scope of work
- Manage punch list process
- Resolve product claims issues (ex. freight claims, 'shorted product', product returns)
- File client sign-off/approval
- Confirm order satisfaction with the client
- Attend monthly departmental meetings
- Concise and well-organized communications

### SECONDARY DUTIES AND RESPONSIBILITIES

- Process demo requests to Service Department
- Service-related project pricing for non-warranty items

- Proposal generation to the client for service-related items
- Obtain client sign-off/approval

### **Corporate Accountabilities & Performance Expectations:**

- Provide prompt, courteous, and exemplary service to all customers, both external and internal, following the corporate vision and core values of Pigott.
- Demonstrate courtesy and professionalism, consistently providing a timely response to every customer service inquiry.
- Support Pigott's commitment to quality by developing and maintaining position-specific procedures, process instructions, and/or forms to better serve the company and customers as necessary.
- Adhere to all guidelines as outlined in the *Pigott Team Member Handbook*.
- Accept responsibility for personal and professional development.
- Perform additional responsibilities at the request of the manager or the Pigott Leadership team.
- Demonstrate cooperation and teamwork in accomplishing the goals and objectives of the department.
- Adhere to Pigott corporate branding standards.
- Maintain confidentiality of business operations on behalf of Pigott and all clients.

### **Position Requirements:**

- Bachelor's degree in marketing, communications, business administration, project management, or a related field is required.
- Minimum three (3) to five (5) years of related work experience is required. Customer service experience in a service-related industry is preferred.
- Solid business acumen with a driven, positive, and professional attitude and strong work ethic.
- Strong problem solving, decision-making skills with an emphasis on solution development.
- Ability to learn quickly.
- Demonstrated attention to detail, with the ability to manage multiple, complex projects simultaneously and in an effective and organized manner.
- Experience in working with cross-functional teams. Excellent interpersonal skills with the ability to take and give direction within a matrix organizational structure and team environment.
- Ability to develop strong relationships, easily build rapport and earn the respect of colleagues and customers.
- Ability to think and act proactively.
- Ability to travel (as needed) to Pigott regional offices, as requested by internal team members to support presentation and sales efforts.
- Ability to proficiently use a financial calculator in the development of astute pricing strategies.
- Demonstrated proficiency with Microsoft® PowerPoint, Microsoft® Word, and Microsoft® Excel. Experience with Microsoft® Publisher, Keynote, and CAP is a plus.
- Ability to listen, understand and respond to external and internal customers' needs promptly; customer service experience in a service-related industry preferred.
- Ability to work the time necessary to complete projects and/or meet deadlines.

### **Position Demands**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required. The physical demands described here are representative of those that must be met by a team member to successfully perform the essential functions of this job.

**Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.**

### **Additional Information**

Pigott, Inc. is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the Company will consider reasonable accommodations for qualified individuals with disabilities and encourage prospective team members and incumbents to discuss potential accommodations with the Company.