

## CLIENT SOLUTIONS SPECIALIST

**Current Incumbent:** Latasha Perry  
**Reports to:** Client Solutions Manager  
**Status:** Full-Time  
**Updated:** 08/01/2017

**Department:** Member& Affiliate Services  
**Direct Reports:** 0  
**Indirect Reports:** 0  
**Eligible for Telework/CWW:** Yes

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### **SUMMARY OF POSITION:**

On the “front lines” of the customer experience, The Client Solutions Specialist provides excellent service and support to all clients who contact the organization. Working with a team of other specialists to address end user issues via phone and email, assisting clients with a variety of tier one and tier two requests ranging in topic, covering a majority of organizational information and services.

### **PRINCIPAL ACCOUNTABILITIES:**

- Assess customer needs and respond to client inquiries in a timely and professional manner via a variety of mediums (email, phone, in-person, mail)
- Work to create engaged and satisfied clients by providing a high level of support and attention to detail.
- ticketing system to handle client inquires and follow them through to resolution
- Maintain an orderly workflow according to priorities
- Work with Client Solutions manager to ensure proper customer service is being delivered
- Meet personal/client solutions team inquiry handling and return targets
- Prepares for client inquiries by understanding products, services, and customer service processes
- Act as liaison to one or more departments to assist client solutions team with understanding upcoming company initiatives and anticipating potential client inquiries
- Work within current organization database to verify and update client information when needed

### **COMPETENCIES:**

- |                              |                            |
|------------------------------|----------------------------|
| 1. Expertise                 | 5. Technical capacity      |
| 2. Communication proficiency | 6. Cultural Awareness      |
| 3. Organizational skills     | 7. Relationship Management |
| 4. Critical Evaluation       | 8. Ethical Practice        |

### **SUPERVISORY RESPONSIBILITIES:**

This position has no supervisory responsibilities.

### **TRAVEL:**

Little to no travel is expected for this position. If any, travel would be local during the business day.

### **REQUIRED EDUCATION AND EXPERIENCE:**

- Bachelor's degree in a relevant field
- 6 months - 2 years of customer service and support experience, ideally in an IT, customer or membership driven environment
- Strong client facing and communication skills
- Strong oral and written communication skills
- Solid organizational skills with ability to balance multiple responsibilities
- Familiarity with the Internet and Microsoft Office products

**PREFERRED EDUCATION AND EXPERIENCE:**

- Experience in membership-driven trade or professional association, or national non-profit organization

**PHYSICAL DEMANDS:**

While performing the duties of the job, the employee is regularly required to sit, use hands to finger, handle or feel objects, tools or controls; reach with hands and arms. The employee may occasionally lift up to 20 pounds.

**WORK ENVIRONMENT:**

Work is regularly performed in a professional office environment and routinely uses standard office equipment.

The physical demands and work environment described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**SIGNATURES:**

This job description has been approved by all levels of management:

Manager \_\_\_\_\_

HR \_\_\_\_\_

Employee's signature below constitutes employee's understanding of the requirement, essential function and duties of the position.

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

**Please send resumes, cover letter and salary history to [Resumes@naahq.org](mailto:Resumes@naahq.org). No phone calls, please.  
EOE M/F/H/V**