

## Sales and Customer Services Specialist

- Job title:** Sales and Customer Services Specialist
- Function:** To work as an integral part of the Sales Shared Services team working across all areas including Customer Services (customer telephone calls and emails), order processing and customer projects (logos, kitted codes, consignments, and commercial invoices).
- Lines of Communication:**
- Upwards – Head of Sales Shared Services
  - Laterally – Specialist Project Coordinator, Project Coordinator, Order Entry Specialists, Accounts Team, Customer Experience Associates
- Responsibilities:**
- To – Head of Sales Shared Services
- Hours of work:** 40 hours per week (1hour for lunch – time to be agreed with line manager).

### Duties

#### 1.1 Telephone calls (inbound and outbound)

Knowledge:

Different styles of telephone communication  
Documentation of calls  
Telephone Account Management  
Dealing with customer queries

Skills:

Ability to adopt the most appropriate approach, to maintain a needs-satisfaction approach  
Providing timely responses to customer queries  
Provide excellent customer experience  
Ability to be proactive to maximise sales and revenue  
Ability to select appropriate style of language to maintain a positive client relationship  
Logging/updating call details and progress

#### 1.2 Emails

Knowledge:

Different styles of email communication  
Documentation of emails  
Dealing with customer queries



### Quotes and Quote Follow Ups

**Skills:**

Ability to adopt the most appropriate approach to email enquiries.

Providing timely responses to customer queries

Ability to select appropriate style of language

### **1.3 Process orders received via web, email and customer portal (Ctrl Cloud).**

**Knowledge:**

Be familiar with the operation of relevant software and channels for incoming order – processing.

**Skills:**

Enter data and process orders through Company ERP, Ctrl Cloud and other web-based order channels, using a high level of keyboard skills.

### **1.4 Cruise Order Processing.**

**Knowledge:**

Be familiar with the operation of relevant software and channels for processing orders for Cruise customers.

**Skills:**

Enter data and process orders through Company ERP, using excel imports. Record all activity on the Company’s CRM, Smartsheet and the customer’s own system (MXP).

### **1.5 Record all order processing and sales order queries on Company CRM**

**Knowledge:**

Be familiar with the Company CRM and utilise to record all order processing and order processing related information.

**Skills:**

Record sales order processing information on the Company CRM using a high level of software and IT skills.

### **1.6 Project Management**

**Knowledge:**

A solid understanding of time scales and criticalness of projects. A good understanding of business processes and the workflows/approval processes.

**Skills:**

The ability to proactively manage expectations and to manage multiple team members ensuring they are always held accountable.

The ability to establish clear lines of communication and always adhere to company processes.



To complete and deliver in a timely manner any projects set by the business to assist in driving the business forward. These projects will each have their own requirements and deadlines.

### **1.7 Setting up of new logos.**

**Knowledge:**

A clear understanding of the information needed to have logos set up. The ability to follow up and ensure logo sign off is prompt and that all systems are always up to date. The ability to work with suppliers, customers and colleagues alike.

**Skills:**

Correct use of the logo set up computer systems (OGL Profit Plus, Sugar CRM and exel) and their approval processes. To keep all systems clear and up to date.

### **1.8 Create and import kitted codes.**

**Knowledge:**

A clear understanding of the information needed to have kitted codes set up, the forms utilised by Sales & Customer Services. A good understanding of excel and keen eye for detail to ensure that forms submitted are correct before importing the codes into the company systems.

**Skills:**

Excellent excel skills and high levels of accuracy are required to ensure that all codes are set up correctly.

### **1.9 Consignments.**

**Knowledge:**

A clear understanding of consignments, how they work, and the information needed to have the consignments, set up, amended or closed. The ability to follow up and ensure customer sign off is prompt and that all company systems are always up to date. The ability to work with customers and colleagues alike.

**Skills:**

Correct use of computer systems, excellent excel, PDF and SmartSheet skills to ensure all documentation is accurate and all systems are clear and up to date.

### **2.0 Producing Commercial Invoices.**

**Knowledge:**

A clear understanding of how to use OGL Profit Plus, excel and word to ensure that all commercial invoices produced are accurate.

**Skills:**

Correct use of systems to software (excel and word) to produce accurate commercial invoices and record all information on the Company's CRM.



**KPI's**

Internal projects to be completed to a high standard and within the agreed timeframe, where possible the project should be recorded on the Company's CRM.

All tasks carried out are documented in the Company's CRM system (measures both On Time Task Completion and On Time Case Completion)

On Time Task Completion to be 90%.

Complete 20 tasks per day.

Take 20% of all calls into the central Customer services line.

Orders received by agreed times need to be processed by the agreed cut off times.

**ROLE PROFILE**

**Key responsibilities and approximate time split:**  
*The key responsibilities for the role are included here and grouped under the following three headings to give a feel for the emphasis and percentage split of the job:*

<ul style="list-style-type: none"> <li>• Respond to customer enquiries and requests that come from both the phone and email.</li> <li>• Order Processing and Cruise order processing</li> <li>• Internal customer projects (logos, kitted codes, consignments and commercial invoices)</li> </ul>	<p>40%</p> <p>40%</p> <p>20%</p>
---	----------------------------------

**Personal Attributes:**

**Business Focus**

<b>Team Results</b>	Sets clear and challenging objectives, inspiring and encouraging high performance in teams and individuals. Reviews progress achieved, publicly and privately recognising achievement.
<b>Personal Results</b>	Sets oneself clear and challenging objectives in line with the company goals and individual KPI's and strives to achieve results.



**People Focus**

<b>Communication-Verbal/ Written</b>	Conveys accurate information effectively, using appropriate methods to reflect the needs of the audience and ensure understanding.
<b>Managing Relationships</b>	Builds and maintains good relationships with customers and colleagues by adopting the most appropriate approach to deal with people and situations.

**Personal Focus**

<b>Personal Organisation</b>	Efficient in one’s use of time and works in a well-structured way.
<b>Self-Development</b>	Takes responsibility for personal improvement, learning from experience and new situations.

**Change Focus**

<b>Adaptability</b>	Responds positively to changing a business circumstances readily adapts behaviour to maintain effective performance
---------------------	---

**Analytical Focus**

<b>Information Gathering</b>	Seeks the full range of relevant and accurate information in a methodical way.
<b>Analysis and Judgement</b>	Logically breaks down problems/situations into their essential parts and draws reasonable conclusions based on their analysis.

**Quality Focus**

<b>Thoroughness</b>	Is accurate, pays attention to detail and ensures tasks are completed on time.
<b>Quality Conscious</b>	Consistently works to a high standard and looks for ways to improve current working practises and processes
<b>Initiative</b>	Takes appropriate action before being asked and actively finds solutions to problems.
<b>Integrity</b>	Shows support for Group Values – particularly demonstrating the highest levels of honesty and integrity.

**Skills required to undertake the role:**

- **Manpower** - Is efficient in the use of one’s time and can sort tasks accordingly so that all the customers receive a similar high level of service.



## Tower Supplies

3 Yarrow Road  
Poole | Dorset | BH12 4TS  
T+44(0)1202 718 000  
www.towersupplies.com  
sales@towersupplies.com



- **Methods** - Use common methods of implementation for new contracts and work with current clients to bring them into a more streamline 'Towerised' way of working.
- **Materials** - Ensure that all the correct materials are in place at the right time so that contracts working efficiently and effectively.
- **Money** - Ensure that all monetary decisions within your role are made with the good of the company in mind and are aimed towards making maximum profit.
- **Minutes** - Organising and prioritising tasks: daily, weekly, monthly, periodically, as needed.
- **Machinery** - Ensure that you treat your workplace machinery with utmost respect and keep it in good working order at all times.

Last updated: January 2023



make the workplace a better place