



# FUNCTIONAL JOB DESCRIPTION

**JOB TITLE:** Customer Service Sales Associate  
**DEPARTMENT:** Conveyor Sales  
**REPORTS TO:** Vice President of Sales and Marketing  
**STATUS:** Non-Exempt  
**PREPARED BY:** Human Resources  
**DATE:** November 2014

**SUMMARY:** Supports sales and marketing by tracking, investigating, and reporting sales information; resolving problems by performing the following duties.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

- Provide administrative support; i.e. (faxes, assist with bids and quotes, input orders as required)
- Maintains customer database by inputting customer profile and updates; preparing and distributing monthly reports.
- Manage customer mailings in conjunction with account managers.
- Manage various reports. Provides sales versus projection results by preparing and forwarding sales tracking reports including COTS (sales, telephone).
- Provides product, promotion, and pricing information by clarifying customer request; selecting appropriate information; forwarding information; answering questions.
- Prepares quotes, contracts and RFP/RFI responses for potential customers.
- Maintains all quote documentation with accurate pricing and configurations.
- Resolves pricing discrepancies by researching regular and special prices; forwarding resolution to managers.
  - Investigates and resolves customer problems and deliveries.
  - Coordinate shipping and deliveries and build shipping (transportation) database.
  - Complete serial tags.
- Assist with preparation of shop work releases.
- Compiles lists of prospective customers for use as sales leads, based on information from ad inquiries, trade shows, direct mail responses, aged leads, dealer resellers, business directories, internet web sites, and other sources.
- Enters new customer data and other sales data for current customer into computer database.
- Works with inside and outside sales representatives to keep account activities up to date.
- Investigates and resolves customer problems and deliveries.
- Resolves order and inventory problems by investigating data and history; identifying alternate means for filling orders; notifying managers and customers.
- Maintain/update CRM information and spreadsheet scheduling.
- Greets visitors and conducts to appropriate area or person.

**QUALIFICATIONS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION (OR EQUIVALENT EXPERIENCE):** Associate's degree (A. A.) or equivalent from two-year college or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience.

**LANGUAGE SKILLS:** Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of organization.

**MATHEMATICAL SKILLS:** Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.

**REASONING ABILITY:** Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

**COMPUTER SKILLS:** To perform this job successfully, an individual should have knowledge of manufacturing software; spreadsheet software and word processing software.

**CRITICAL PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit and use hands to finger, handle, or feel. The employee is frequently required to reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk and stoop, kneel, crouch, or crawl.

**WORK ENVIRONMENT:** The work environment characteristics 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.

The noise level in the work environment is usually quiet.

\*Each employee should be aware that changes in this job description could occur at any time. Also this job description is not to be considered or construed to be a contract of employment.

**APPROVAL DATE**

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Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Vice President of Sales and Marketing

\_\_\_\_\_  
Date