

## **JOB DESCRIPTION**

Job Title: Customer First Specialist  
Location: Richmond  
FLSA Status: Non-exempt

Reports to: Client Services Director  
Department: Operations

### **Summary job description**

The Customer First (Retention) Specialist contributes to revenue retention and growth thru active engagement with clients concerning their support contract with InSource and their overall client experience.

### **Essential job functions**

- Manage relationships with assigned clients and Account Executives to create a strong positive client experience.
- Conduct Customer First Renewal process: contact client well in advance of renewal date, communicate renewal options and overall value of support. Develop strong relationships. Remain in contact until contract is renewed or closed lost.
- Document all communications in CRM
- Respond to incoming requests
- Document customer outcomes to add to our knowledge of reasons why customers cancel
- Identify opportunities to turn dissatisfied customers into happy ones
- Identify new business practices that could be introduced or suggest modifications to existing practices to reduce risk of customer cancelation
- Desire to work in and potentially advance to growth roles (technical, sales or leadership) in industrial automation company
- Other duties as required such as training new employees, working on projects etc.

### **Minimum job requirements**

- **Education:**
  - High school diploma or equivalent required; Associates degree or equivalent in computer engineering.
- **Experience:**
  - Must have a minimum of 3 years' experience in customer retention/renewals in software, manufacturing or other related business.
  - 1 ½ or more years of preparation of detailed quotes and proposals; communication with sales personnel, and general sales support activities. Must be experienced with product pricing, discounting, etc.
  - 1 ½ or more years of quoting detailed catalogue and custom parts
  - 1 ½ years in computer engineering, network engineering or other IT field.



- **Specific Skills:**

- Excellent self-discipline, time management and organizational skills
- Strong relationship building and maintenance skills
- Must be able to maintain organization despite interruptions including calls, e-mails and urgent request
- Able to speak with confidence to various levels of professionals
- Must be detail and deadline oriented. Process oriented.
- Able to work with a team
- Able to cross-train on multiple functions to support department.

- **Specialized knowledge, licenses, etc.:**

- Proficiency in Microsoft Word, Excel and Outlook
- Experience with NetSuite and/or Quosal or other CRM

- **Other:**

- Demonstrated client service approach.
- Supervisory experience a plus.

**Supervisory Responsibility:** none

**Work Conditions:** General office environment.

InSource is an equal opportunity employer of protected veterans and individuals with disabilities.

EEO/AA – M/F/D/V