



# POSITION DESCRIPTION

prepared for

**CSR**  
**Client Services Representative**

DATE: 2012

PREPARED BY: ALISHIA GAINES

**WORLD'S BEST I.T.SUPPORT**

[www.originit.co.nz](http://www.originit.co.nz)

## TABLE OF CONTENTS

1.	JOB IDENTIFICATION .....	3
2.	JOB SUMMARY .....	3
3.	JOB RELATIONSHIPS .....	4
4.	KEY OBJECTIVES INCLUDE .....	4
5.	JOB RESPONSIBILITIES .....	4
6.	KPI'S .....	5
7.	ESSENTIAL COMPETENCIES.....	6
8.	PREFERRED COMPETENCIES .....	6

## 1. JOB IDENTIFICATION

TITLE	CLIENT SERVICES REPRESENTATIVE
LOCATION	ORIGIN I.T.
WRITTEN BY	ALISHIA GAINES – DIRECTOR HR
REPORTING TO	SALES MANAGER

## 2. JOB SUMMARY

In the SME market, Origin I.T. meets the needs of clients who can't justify hiring a fulltime I.T. Manager but do require I.T. support on a regular basis. For these clients, Origin I.T. provides proactive support to make I.T. easy. This enables us to take away a lot of the pain they're having in running their I.T. systems. Therefore, our clients outsource I.T. to us. We provide them with an I.T. plan and strategy, along with all their I.T. equipment and product and proactively help them manage their I.T. infrastructure. We'll take the time to understand their processes, set up their infrastructure and provide I.T. solutions that are designed to help them be more productive.

In today's high-tech world, it's still people that make the difference. That's why Origin I.T. puts so much emphasis on bringing the human touch to the I.T. industry. We bring a human aspect to our business - people dealing with people. As CSR, you are the key part of part of this philosophy. This role is essentially responsible for supporting the sales team at Origin I.T. on a daily basis. You will be charged with continuing to provide the best service and communication to our clients and team and looking for further business opportunities. You will also be working closely with our key suppliers and maintaining a great business relationship with them.

### 3. JOB RELATIONSHIPS

Directors  
Sales Manager  
Sales Team  
Clients  
Administration Team  
Key Suppliers

### 4. KEY OBJECTIVES INCLUDE

This is a very important role that represents the high level of service and professionalism Origin I.T. Ltd provides to their corporate and business clients. Your goal is to achieve your sales targets and key performance indicators. Time management is a critical part of this role and identifying which tasks take priority.

### 5. JOB RESPONSIBILITIES

#### **Sales Support**

Email sales advising of action, keeping them informed of clients requests & expectations.

Preparation and typing of quotes. Sourcing product information. Pricing and availability.

Getting POD's (proof of deliveries) when necessary. Following up suppliers regarding deliveries as needed, liaising with purchasing.

Servicing key accounts in conjunction with the assigned Account Director, by providing exceptional client service, clear and prompt communication and attention to detail.

Actively look for sales opportunities within these key accounts and new business development.

Working closely with Product specialists and suppliers

Attending Sales Training

Meeting Key Performance Indicators

## 6.KPI'S

<b>#1 PROPOSALS</b>	Preparing ONEFEE proposals
	Preparing Solution/Project proposals
	Updating proposal documentation
	Eclipse pricing (if needed)
<b>#2 QUOTING</b>	Preparing quotes
	Chasing Quotes + adding ITQ Notes
	Maintaining ITQ
<b>#3 RENEWALS</b>	Follow renewals process / Maintaining ITQ
<b>#4 ORDERS</b>	ITQ process orders
<b>#5 RA's</b>	RA process
<b>#6 ADMIN/OTHER TASKS</b>	Engineering leads + quotes
	Project updates
	manage & maintain
<b>#7 TRAINING &amp; DEVELOPMENT</b>	Regular industry or job related training
<b>#8 REPORTING</b>	ONEFEE reviews

## 7. ESSENTIAL COMPETENCIES

Excellence in Client Service  
Attention to Detail  
Industry experience  
Well organised and detail oriented  
Good communication skills  
Ability to take charge of own tasks and meet deadlines  
Excellent time management  
Ability to multi task  
Desire to learn  
Be an integral part of the team  
Accurate record keeping and data entry  
Professional and helpful attitude  
Interest and motivation to further selling career

## 8. PREFERRED COMPETENCIES

Understanding of IT Sales & Services cycles  
Accounts Payable  
Licensing of Software Systems

Employee Name: ..... Date: .....

Employee Signed: .....