

# Account Coordinator

Job Code: SAL100



## Position Summary

Act as a liaison between Ingenium and customers to ensure all customer inquiries are addressed in a sufficient and timely manner. Assist internal personnel with various tasks to ensure proper completion of all projects.

## Responsibilities

Duties include but are not limited to the following:

### Essential function(s)

- Answer incoming calls, screen, and transfer to appropriate staff members.
- Ensure client data is accurately entered and maintained in all internal systems.
- Complete account setup and new vendor paperwork for clients.
- Ensure pricing and billing terms are accurately entered and maintained in all internal system.
- Maintain an updated Salesforce account including activities, appointments, opportunities, etc.
- Prepare Master Service Agreements, Contract Renewals, Quotes and Estimates.
- Conduct contract negotiations.
- Maintain client requests and all related conversations and/or subsequent data in the Company's ticketing system.
- Contact customers to obtain accurate service inventories and service needs.
- Prepare and submit orders for servicing requests through internal systems.
- Run project log and status reports.
- Submit new and revised waste stream profile requests.
- Obtain knowledge of services, prices, delivery time, special projects, various marketing and promotional services, and similar data, as required.
- Update and maintain pricebooks.
- Demonstrate industry knowledge.
- Provide Portal Demonstrations to Generators.
- Focus efforts on managing accounts for assigned branch(es), Territory Sales Representatives and Account Managers.
- Respond to customers' requests via telephone, Freshdesk or email, including but not limited to:
  - Scheduling adjustments
  - Questions related to orders
  - Technical questions
  - Pricing and invoicing inquiries
- Route customer requests internally to provide appropriate and accurate responses.
- Resolve service problems by clarifying the customer's complaints/needs; determining the cause; selecting and explaining the best solution; expediting the request and following up to ensure resolution.
- Inform clients of pricing changes, profile discrepancies, waste rejections, etc.
- Act as a liaison with Data Department to compile monthly, quarterly and yearly shipment and spend reports.
- Other duties as assigned by supervisor.

### **Non-Essential function(s)**

- Assist with reconciling service paperwork when needed.
- Complete customer touch point programs.
- Act as liaison with other internal departments to ensure project completion.

### **Qualifications and Experience**

- 2+ years' progressive experience performing a variety of office, administrative and customer service tasks.
- Previous experience in environmental services, web-based ticketing systems, and/or Salesforce CRM preferred but not required.
- Excellent communication skills including written, verbal, listening, and customer service skills with the ability to effectively communicate with and work well with others in order to manage projects, etc.
- Must have a positive attitude.
- Must exude professionalism, possess a strong Customer Focus.
- Pleasant telephone manner with an upbeat and friendly demeanor.
- Ability to project a calm and professional demeanor regardless of the type of environment (calm, fast paced, high stress) or type of clientele with the ability to effectively manage stress.
- Exceptional organizational skills with a high consideration to detail and accuracy.
- Excellent communicator with the ability to properly and effectively inform others; strong supply management, reporting, and inventory control skills.
- Resourceful, self-motivated with a sense of urgency and strong work ethic.
- Capable of regularly using good judgment and problem solving skills to accomplish goals and work requirements.
- Able to effectively manage processes and analyze information.
- Adept at time management.
- Able to work with finite deadlines.
- The ability to work independently as well as in a group environment.
- Trustworthy, honest, respectful, and flexible.
- A desire to learn and advance in a fast-paced environment.
- Must be able to be entrusted with confidential information.
- Proficient computer skills working with various office equipment, computers and various programs including Word, Outlook, PowerPoint, Excel, etc. and the ability to effectively work on spreadsheets, word processing, networking, and e-mail programs.
- Previous experience in environmental services and Sales preferred but not required.
- Authorized to work in the United States for any employer.

### **Education and Certifications**

- Bachelor's Degree preferred but not required.

### **Performance Expectations**

## All Employee Performance Expectations

Responsibilities	Expected Results	Metrics of Excellence
Safety & Compliance	A safe and healthy workplace resulting from proactive employee engagement, hazard identification, and strong regulatory adherence. This boosts Ingenium's reputation, reduces costs, lowers insurance premiums, and fosters a safe environment where employees feel valued, leading to higher morale, retention, and uninterrupted business operations.	<ul style="list-style-type: none"><li>• Timely reporting of incidents and Good Catches, incident investigations, and corrective action identification and closure</li><li>• Timely completion of required training to ensure employees have the necessary knowledge and skills</li><li>• Zero incidents and injuries tied to inattentiveness / faults</li></ul>
Company Policy	Contributing to a well-organized, safe, and legally compliant work environment that benefits both the individual and the organization as a whole. Everyone in the company is treated equally and fairly, which improves morale and reduces conflicts.	<ul style="list-style-type: none"><li>• Adhering to company policies and procedures at all times, including but not limited to standards of professional conduct, all state and federal wage and hour laws, and workplace safety</li></ul>

## Job Specific Performance Expectations

Responsibilities	Expected Results	Metrics of Excellence
<b>Customer Service Ticket Management (FreshDesk)</b> Manage tickets by ensuring clear, effective communication with customers and internal teams. They will prioritize tasks based on urgency, solve issues promptly, and consistently uphold both regulatory and company standards	A competitive edge and customer retention all while streamlining internal processes.	<ul style="list-style-type: none"><li>• Respond to all customer inquiries within 2 hours.</li><li>• Respond to internal staff inquiries within 24 hours.</li><li>• Touch all tickets daily to ensure continuous progress.</li><li>• Effectively manage and minimize overtime while ensuring all service standards are met.</li><li>• Ensure 100% positive feedback on FreshDesk surveys; if a negative survey is received, follow up within 1 hour.</li></ul>
<b>Client Data &amp; Service</b>	A strengthened operational	<ul style="list-style-type: none"><li>• Maintain a paperwork</li></ul>

**Management (WLQ)**

Maintain accurate, error-free handling of customer accounts and information. They will demonstrate strong technical aptitude by effectively using and maintaining relevant systems and tools. Communication with customers and internal teams will be clear, concise, and professional, ensuring seamless service.

performance and customer relations, contributing to long-term success.

error rate of less than 1% per month.

- Prepare 100% of Orders by noon each day.

**Client Pricing (SalesForce)**

Pricebooks are handled with precision and accuracy.

Higher financial accuracy and customer loyalty, contributing to the company's long-term profitability and reputation.

- Achieve less than 5% in monthly reworks.

## Core Competencies

### Company Competencies

**ALL IN:** Takes a long-term view and builds a shared vision with others; acts as a catalyst for organizational change. Influences others to translate vision into action. Can meet organizational goals and customer expectations. Holds self and others accountable for measurable high-quality, timely, and cost-effective results. Determines objectives, sets priorities, and delegates work. Accepts responsibility for mistakes. Comply with established control systems and rules. Practices company's mission, vision, and values. Is a key player in the company culture and promotes teamwork.

**Communication:** Employees have strong communication skills. They provide regular updates to their managers and communicate the status of their projects to both managers and coworkers. If they discover an issue, they ask for help when necessary and present potential solutions while discussing with their manager. They have strong verbal and written communication skills and are adept and knowing which form of communication should be used in each situation. Communicates and provides transparency. Information has to be open and accessible for every team member. This provides the environment for people to feel confident, supported, and empowered. Shares the vision -the vision that the team is collectively working to achieve. This gives every team member a shared goal to work toward and helps define the role every person can play in making it a reality. Influences. Has a range of communication skills that meet the needs of a diverse organization or community. An increased ability to resolve conflicts.

**Customer Focus:** Sees the customer's perspective/empathy. Exceeds customer's expectations and foresees problems. Is proactive with continuous improvement and attends to the details. Is thorough and informative and proactively identifies the best communication method. Provides service excellence to internal and/or external clients. Committed to the entire customer experience and going beyond meeting basic customer requirements to deliver those unique features and characteristics that are most important to the customer and differentiates Ingenium from its competitors. Formulates strategies and processes to evaluate emerging and longer-term opportunities and threats to meeting clients' needs. Determines strategic business direction to best meet clients' evolving needs. Evaluates the client service model and

service standards to identify areas for improvement.

**Information Management:** Has the ability to demonstrate support for innovation and for organizational changes needed to improve the organization's effectiveness; initiating, sponsoring, and implementing organizational change; helping others to successfully manage organizational change. Initiates and leads change to ensure continuous improvement and make the organization successful. Responds resourcefully and constructively to new opportunities to learn and grow and new ways of getting work done. Uses personal knowledge and professional experience to envision the future, anticipate change, capitalize on opportunities and develop innovative options that further the strategic direction of the organization. Understands and adapts to changes in the strategic and/or operational direction of the organization. Shows foresight and imagination to see possibilities, opportunities and trends. Demonstrates commitment to seek out opportunities and contributes to developing innovative or alternative solutions. Understands the strategic direction and goals of the organization and aligns personal performance objectives with organizational priorities.

**Leadership:** To attract and mobilize energies and talents; to work towards a shared purpose in the best interests of the organization, the people comprising it and the people it serves.

**Safety:** Safety and Environment awareness – performs job in a manner that minimizes hazards to oneself, others, as well as the environment. Keeps work areas clean and safe and takes action to remove or remediate safety hazards in own work area and within the organization. Follows appropriate hazardous waste management procedures. Knows the departmental emergency plans for fires, disasters and emergencies. Recognizes and acknowledges safe behaviors exhibited by co-workers. Regularly communicates safety and environment awareness as a priority. Considers impact on environment as practices and procedures are developed and work is delegated.

**Technical Capacities:** The ability to demonstrate depth of knowledge and skill in a technical area. Effectively applies technical knowledge to solve a range of problems. Possesses an in-depth knowledge and skill in a technical area. Develops technical solutions to new or highly complex problems that cannot be solved using existing methods or approaches. Is sought out as an expert to provide advice or solutions in his/her technical area. Keeps informed about cutting-edge technology in his/her technical area. Demonstrates the appropriate level of proficiency in the principles and practices in one's profession. Demonstrates a commitment to continuous improvement, to include understanding and application of technology (equipment, processes, hardware and software). Has ability to make decisions that produce high-quality results by applying technical knowledge, analyzing problems, and calculating risks.

## Job Competencies

**Time Management:** Employees use time to their advantage. They schedule specific times to complete tasks, avoid procrastinating, prioritize their tasks in line with department deadlines and goals, start their most difficult tasks first thing in the morning, follow up on requests, and use downtime for planning and preparation. They break up projects into specific action steps and keep the process moving. They keep organized records for quick reference when completing tasks. A large part of time management for employees is to understand the scope of a project before beginning work on it. Top employees understand their tasks, why they are performed, and how they fit into the big picture.

**Teamwork:** As a team member, the ability and desire to work cooperatively with others on a team; as a team leader, the ability to demonstrate interest, skill, and success in getting groups to learn to work together.

**Problem Solving/Analysis:** The ability to tackle a problem by using a logical, systematic, sequential

approach. Makes a systematic comparison of two or more alternatives. Notices discrepancies and inconsistencies in available information. Identifies a set of features, parameters, or considerations to take into account, in analyzing a situation or making a decision. Approaches a complex task or problem by breaking it down into its component parts and considering each part in detail. Weighs the costs, benefits, risks, and chances for success, in making a decision. Identifies many possible causes for a problem. Carefully weigh the priority of things to be done.

## Manager Competencies

N/A

## 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.

- Most work is performed in a temperature controlled office environment.
- The employee will occasionally lift and or carry up to 25 lbs.
- Employee may use computer, phone, copier, and other office equipment in the course of a day.
- While performing the duties of this job, the employee is occasionally required to use hand to finger, handle or feel objects, touch and use tools, reach with hands and arms, climb stairs, bend, stoop, twist, lift, reach, push, pull, grasp, balance, kneel, crouch, crawl, grasp, talk, hear, and walk during the course of employment.
- Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and an ability to adjust focus.
- Employee may be required to travel for business purposes.

*Select the applicable Corporate or Sales physical demand selection below.*

Corporate: While performing the duties of this job, the employee is required to walk 10% of the time, stand 10% of the time and sit 80% of the time.

## Environment

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential function of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing this job, the employee is exposed to weather conditions prevalent at the time. This may include warm, hot, or cold temperatures. The noise level in the work environment is moderate.

## Work Schedule

Non-exempt: As a non-exempt hourly employee, the employee shall work a designated schedule as assigned by management. Employees shall not work over 40 hours per week without prior authorization from management but if so, will earn overtime for any work performed in excess of 40 hours per week or 8 hours a day (CA). Employees must also follow the company's policies regarding required meal breaks.