

## **CLIENT ENGAGEMENT SPECIALIST**

**CAVU GROUP**

**DAYTON, OHIO AREA**

### **JOB DESCRIPTION**

**SUMMARY:** CAVU Group is looking for an energetic, passionate, and customer-focused Client Engagement Specialist reporting to the Vice President, Sales and Business Development. In this pivotal role, as the Client Engagement Specialist, you will be supporting the successful delivery of our temperature management and monitoring solutions around the globe. You will be at the center of the CAVU Sales team, providing the global Sales team and our distributors with an in-depth knowledge of our product line supporting monthly and annual financial goals. Success in this role, means you will be exceeding customer expectations through focused and productive communication with new and existing clients including process development, RFX submissions, Lead Management, Support Cases and more. This mission critical role includes helping to resolve complex inquires/issues, project management, coordination with Operations and Production as the liaison for Sales and Order Management. A keen sense of ownership, efficient execution and collaboration is a must. We are offering the right person the opportunity to join our dynamic and growing company and impact the future of CAVU Group.

### **DUTIES AND RESPONSIBILITIES:**

- Working hours are 8:00am-5:00pm Monday through Friday. Occasionally additional hours may be required
- Deliver exceptional customer service and support to new and existing client base to meet their needs in a timely and professional manner.
- Provides sales and administrative support involving efficient handling of confidential agreements.
- Establish and manage customer support (cases).
- Provide back up for processing sales orders through SAGE ERP system.
- Forecast, maintain, and adjust all accounts with future orders using HubSpot CRM and SAGE ERP software to ensure Production has proper unit inventory to meet the supply and demand of client base.
- Aid sales team in attaining company revenue and unit quota by providing accurate status reports, client support, and assistance with internal processes.
- Provide relevant information regarding contractual agreements to the QA department to ensure quality forms are up to date and accurate. Tracks agreements w/ renewal dates and notifies Account Manager when agreements are due for renewal.
- Acts as SAGE ERP Subject Matter Expert for Sales team and enter new customers, contacts and information into SAGE ERP.
- Assist Sales team in quotations through SAGE ERP.
- Maintain an efficient work environment.
- Coordinates and plans internal project and forecast meetings
- Supports new sales strategies including RFP, RFI and RFQ development.
- Understand and provide back up for customer support and quality related activity.
- Assist in gaining customer feedback through phone calls and/or email surveys.
- Assist in providing sales and tech support for customers.
- Manage internal price lists.

- Understand and provide back up for the line extension process.
- Represent sales organization in customer and production meetings.
- Coordinate with accounting and sales to address past due customer payment issues.
- Provide part time coverage of inbound phone calls.

**Skills and Specifications:**

- Excellent polite and persuasive communication skills
- Passionate, self-starter
- Well organized professional with ability to prioritize and multi-task
- Able to exert sound judgment, discretion and preserve confidentiality
- Ability to meet deadlines
- Able to work in team environment
- Keen attention to detail
- Able to operate in different work conditions such as on-site, off site
- Bilingual in Spanish, Chinese or German a plus
- Experience with CRM systems, HubSpot experience a plus
- Experience with ERP systems, SAGE experience a plus
- Highly skilled in Excel, proficient in Microsoft Office Platform
- 3+ years in Customer Service including logistics and international shipping desirable

**Employee Signature:** \_\_\_\_\_

**Supervisor Signature:** \_\_\_\_\_

03/2020