



THE DIBBLE INSTITUTE POSITION DESCRIPTION

Job Title: Client Services Coordinator

Date: July 23, 2024

Reports to: Executive Director

Status: Full-Time/Non-Exempt

Purpose of Job: Interacts with the clients and prospects via email and phone to process orders and provide client service support. Manages inventory and vendor relations. Reports on sales, including processing royalties.

MAJOR DUTIES AND RESPONSIBILITIES (Essential Functions):

1. Writes quotes and invoices clients for products and services in QuickBooks, processes payments, sends orders to warehouse for fulfillment, resolves client issues, calls on past due invoices. Communicates information about new clients to Dibble team.
2. Manages interface between the online store, QuickBooks, the warehouse software, and Salesforce.
3. Invoices training clients and manages trainer reimbursements. Coordinates conference exhibit materials.
4. Uploads clients to email marketing program; manages email master calendar; sends relevant emails. Pulls reports as requested. Generates monthly and quarterly performance dashboard reports. Checks for database errors.
5. Calculates royalties.
6. Reconciles Quickbooks and warehouse inventory. Works with vendors to order new materials as needed.
7. Supports the Outreach and Program teams' efforts as time is available.
8. Other duties as required or assigned.

REQUIRED KNOWLEDGE AND ABILITY:

1. Commitment to The Dibble Institute's mission.
2. Must have prior successful experience in customer service, bookkeeping, and/or administration. Works accurately with an eye to detail. Ability to work well under pressure.
3. Excellent interpersonal skills.
4. Communicates clearly, both written and verbally.
5. Proven experience working with a virtual team and organizing projects with a minimum of supervision. Able to work a consistent schedule during business hours.
6. Prior experience with Apple computers, online commerce software, QuickBooks, GetResponse; and Salesforce helpful.
7. Valid driver's license and current auto insurance.
8. Ability to lift 30 lb. unassisted.