

JOB DESCRIPTION - PROJECT SERVICES ASSOCIATE

About Us

Leadership Circle is a leadership and organizational development company at the forefront of the field. We provide the model and platform for the best leadership development worldwide. With over 100 employees located all over the world from Sydney to Amsterdam to right here at our headquarters in Draper, UT, we represent a global footprint that is growing rapidly.

Leadership Circle prides itself not only on its access to best practices but also on the talent of its people. Employees enjoy a supportive company culture and many opportunities to grow as the company scales. We think it's an awesome place to work and are confident you will too.

The Role: Project Services Associate:

The role of the Project Services Associate (PSA), is to provide customer support on all Leadership Circle software platforms, provide project management services, as well as accounting, technical and project design support to Practitioners and their clients. PSAs focus on proactively building relationships with customers via phone, email, and various software platforms. As part of a Sales/ Business Development cross-functional role, PSAs help Practitioners decipher report outcomes such as statistics, percentiles, raw scores, and provide appropriate materials as backup. PSAs have a thorough knowledge of Leadership Circle's universal model of leadership, products, and services, so they can make appropriate recommendations; empower Practitioners and survey-takers through training; and upsell products. The role requires superior communication and interpersonal skills. It also requires advanced organizational and multi-tasking skills; the ability to manage several projects at a time; and an inherent ability to work cohesively within a team, and cross-functionally when needed.

Responsibilities

- Answer Practitioner and survey-taker emails and phone calls promptly and professionally. Phone calls should be answered within 15 seconds, and email responses are answered as soon as possible, and no later than within 24-hours of receipt of the email.
- Schedule meetings, phone calls and events and effectively maintain a calendar that allows non-stop phone and email coverage between the hours of 8:00am and 5:00pm (MST).
- Proactively research new products, services, alternative solutions, industry trends, and stay aware of other department and regional information and news.
- Assist Practitioners with finding support resources such as how-to documents, webinars, videos, marketing materials, etc.
- Maintain customer databases by continually updating contact information in Netsuite, Project Center, LCGo, and Salesforce, Fonteva, Asana, Box, and Google Sheets.
- Assist Practitioner and survey-takers with all technical support issues including login assistance, creating passwords, domain white-listing, receiving reports, etc.
- Prepare documents including trainings, solution templates, contracts, and proposals.
- Work with FedEx to create delivery airbills, tracking packages, and resolves delays or errors.
- Provide Practitioners with help understanding reporting outcomes such as statistics, percentiles, and raw scores, and provide appropriate learning/backup materials as further support.
- Receive payments, issue credits, create Sales Orders, Work Orders, issue promo codes, and provide Account Reconciliation.
- Authorize charity-pricing requests after receiving and verifying specific parameters.
- Assist Accounting with collecting on past-due accounts by contacting Practitioners, taking payments, arranging for payment plans, and managing those plans over a 3-6-month period.
- Provide back-up support to the Fulfillment Associate when necessary.

- Provide project estimates, setup prepay accounts, and assist with Statement of Work, Letters of Agreement, and other work delivery requests.
- Provide full project management administration for clients seeking Concierge Service and Certification BOGO participants. This includes administering Leadership Circle Profiles, ME Profiles, Pulse, or Collective Leadership Assessments, managing projects from creation to producing reports and ensuring reports and materials arrive on time.
- Track relevant time and services rendered and create Sales Orders to ensure payment.
- Track information and provide reporting monthly, regarding Project Management, BOGO projects, Fulfillment, and Certification.
- Support Operations overflow by taking on “Tools & Mats” project management.

Qualifications and Requirements:

- Two years of customer service and technical support experience required.
- Customer-first orientation.
- Ability to think critically, problem-solve, and be confident making decisions.
- Excellent project management experience and skills.
- Working knowledge of MS Office Suite including Word, Excel, and PowerPoint.
- Preferred working knowledge of Netsuite.
- Excellent organizational and time management skills.
- First-rate verbal and written communication skills.
- Basic Accounting skills.
- Self-Starter and willingness to train and research on your own.
- Ability to analyze, troubleshoot and solve technical issues with browsers, system functionality, user experience and other technical related issues.
- Able to work collaboratively with others and be open to change.
- Tolerance for a high level of ambiguity and autonomy.
- Total commitment to maintaining absolute client confidentiality.

Pay Range: \$40-\$45,000 /DOE

Job Type: Full-time; in-office and/or work-from-home.

Days: Monday – Friday

Hours: 8:30am to 5:30pm w/30-minute lunch