



**THE ART OF
APPLYING®**

POSITION TITLE: Customer Service & Administrative Assistant

MANAGER'S POSITION: Executive Assistant

RESULT STATEMENT: The Customer Service Associate helps ensure that every customer has an outstanding experience working with The Art of Applying.

WORK LISTING:

Strategic Work:

1. Serve as the bridge between the Enrollment Team and Consultant Team by welcoming new clients into our program and helping them get started and find their way around.
2. Serve as the point person for the client for any logistical or administrative questions they have during their engagement.
3. Investigate, learn, and then document company policies, best practices, and procedures related to onboarding and customer service using company's process documentation method.
4. Recommend to the Executive Assistant improved policies, procedures, and systems to help the business' onboarding and customer service run more smoothly and efficiently.
5. Take the lead in proposing, planning, creating, maintaining and updating an engaging Onboarding Guide for new clients (i.e. This might be video, a text guidebook, a series of articles, etc.).
6. Provide information and assistance related to administration and customer service to other company employees.

Tactical Work:

1. Conduct a 60-minute Onboarding Call via Zoom (cameras off) with each new client within the first week of their enrolling in one of our programs. During the Welcome Call, walk them through what is included in their package, how their client portal in Basecamp works, and how to use their client folder in Google Drive. Make note of any questions the client asks that you are unable to answer and pass those on to the client's consultant.
2. Create client portals in Basecamp for new clients using the template and established process.
3. Reach out to clients who have outstanding payments to remind them to make their payment. Mark delinquent paying clients in our system.
4. Post transition/graduation messages in the portals of clients who are finishing with their Application Accelerator phase of the program, outlining what they should do next and what will change for them moving into the Application Momentum phase
5. Update the Recordings Library with the latest links to the recordings of our weekly Q&A calls, Test Prep calls, and monthly Q&A calls. In association with this, making sure that all of these recordings have been timestamped.
6. The day before weekly group Q&A calls, monthly group Q&A calls, or test prep calls, post a reminder message in the appropriate Facebook groups with dial-in information.
7. Update the Application Accelerator Resources folder with additional examples of materials for our clients to use.
8. Use the software Airtable (or something similar) to create a searchable database of scholarships for our customers.
9. Coordinate with our Enrollment Team in order to optimize our Onboarding training portal within Basecamp for new Breakthrough Coaches.
10. Pair new clients with appropriate consultants and then reach out to those selected consultants in order to request them to take on the assignment(s) and ensure that they have access to all of the resources they will need in order to take on the assignment.
11. Send out customer updates from the Executive Assistant and CEO when necessary.
12. Conduct a thorough audit of the blog post content on our website, making note of and fixing broken links, adding featured images to blog posts, and noting which blog posts need to be updated or revised.

STANDARDS:

Position-Specific

1. Give clients access to their client portals no later than 24-48 hours before they are scheduled to start their program.
2. Proactively alert the Executive Assistant if and when you are overloaded with tasks or projects that exceed your allotted work hours or exceed your ability to perform excellently on, so that you can prioritize and focus on the most important projects to company success.
3. Post the recordings of calls within one business day of the call.
4. Post time stamps of call recordings within one week of the call (before the next call happens).
5. Other administrative tasks which may be assigned to you.

Company-wide:

1. All work will be performed in accordance with all government laws, regulations, ordinances, and court rulings in those jurisdictions in which the company operates.
2. All work will be performed according to company policies and standards, in the spirit of the company's strategic objective.
3. All work will be orchestrated and quantified when appropriate.
4. All routine work will be documented in the online operations manual. The information included in the operations manual is proprietary.
5. All client and proprietary company information will be held as strictly confidential.
6. All telephone calls, both internal and external, will be returned within two hours whenever possible, and within one business day at the latest.
7. Immediate manager will be notified of any issues that can not be resolved, or deadlines that can not be met, within a reasonable time frame, and before the deadline has arrived.
8. All innovation will be quantified, tested, and improved, then documented for routine implementation (i.e. well orchestrated once proven).
9. Problems with any system must be brought to the attention of manager in an exception report so the system can be improved, within the structure of the operations manual.
10. All Policy memoranda indicating changes in policy and/or procedure will be stored in the online operations manual, until the time an updated procedure is provided.
11. Team members will provide staff assistance as requested; each team member may be asked from time to time to cover other areas of accountability and/or departments.
12. Team members will respect each other's time, space, and need for concentration. Socializing and interruptions must not impede workflow.
13. Team members will have weekly, regularly scheduled meetings with their manager.
14. Team members are encouraged to recommend ideas for the improvement

of their department and position that are consistent with the company's Strategic Objective.

15. Show up to work well rested, enthusiastic, and positive each day.

DISCLOSURE:

The Art of Applying® does not intend this Position Statement to constitute or be an offer of an employment contract, express or implied. The Art of Applying® may change this Position Statement at any time. The Position-holder understands that their position is as an independent contractor and either party may terminate the contractor relationship at any time, with or without cause, with or without notice.