



## Customer Specialist Job Description

*Updated June 2021*

Customer Specialists are responsible for customer, client, and vendor interactions, data processing, job documentation, mailing documentation, proof creation, estimates, purchase orders, invoicing, workflow prioritization, and general office tasks. They ensure all customer, client, and vendor interactions are timely, professional, and that all service needs are met and documented.

They ensure mail parcels are assembled as intended and are free of defects or others issues and that data meets the minimum processing requirements and standards; in this way a Customer Specialist is responsible for both manufacturing and quality control.

### Customer Specialist Duties and Responsibilities

To accomplish their primary goals of customer interaction and data processing, Customer Specialists perform many tasks; ALLMAIL USA, INC. has identified these core Customer Specialist duties and responsibilities:

#### **Production Schedule and Expectations**

Customer Specialists are expected to help-set and understand the necessary production schedule and communicate any concerns regarding the ability to meet the daily production requirements. This request for assistance should be done as soon as possible, so that additional help can be allocated to assist.

#### **Customer Interactions**

It is the Customer Specialist's responsibility to be the face of ALLMAIL USA, INC. through face-to-face customer/client interactions, phone calls, and emails. Customer / client communications are expected to be polite, knowledgeable, and embody the core values of ALLMAIL USA, INC.

#### **Data Processing**

A Customer Specialist may receive a client's data in various ways including but not limited to in-person, via telephone, fax, email, and Dropbox. It is the Customer Specialists' job to safeguard the client's data to ensure it does not become corrupted, stolen, or compromised. A Customer Specialist will use the various applications and software (such as BCC, Endicia, and the Microsoft Office suite, etc.) to clean and prepare the data for customer review, approval, and mail file / postal paperwork creation. This could include, but not limited to, the removal of duplicates, removal of bad addresses, list purchasing, text formatting, address formatting/validation, proof creation and approval tracking, Processing Acknowledgement Form (PAF) facilitation, identification and confirmation of permit used, verification of Nonprofit status, creation and use of Customer Registration ID (CRID), creation and use of Mailer ID (MID), and preparation of the

mail for drop shipping. Data will be stored in a secure, logically categorized, internally accessible, and internally reproduceable fashion.

### **Marketing**

As a representative of ALLMAIL USA, INC. for customer/client interactions, the Customer Specialist is also responsible for assisting in the marketing of services. This could include, but not limited to, email communication, postcard mailers, identification of an underserved customer or market, etc.

### **Office Equipment Setup, Operation, Adjustments, and Maintenance**

Customer Specialists perform office equipment setup, operation, equipment adjustments, and preventative maintenance tasks to meet all standards for safety, quality, and efficiency. This includes, but not limited to: multi-function devices, production office printers, desktop office printers, scanners, label makers, desktop computers, postal meters, scales, etc. The Customer Specialist is expected to follow all safety protocols while working with the supplied equipment to prevent damage to the machines and bodily injury to oneself.

### **Quality Inspections and Control**

Customer Specialists are responsible for day-to-day customer interaction, data processing, as well as overseeing the quality of the mail parcels they help produce; it is their responsibility to know and understand acceptable mailing requirements and to correct / discard parcels and files not meeting these expectations. Additionally, as our parcels are reflections of the clients we represent, it is the Customer Specialists' job to ensure all mail parcels are produced in a clean and orderly fashion without damage that may reflect badly on the client. Produced data files and postal reports should be accurate and match the data or project for which it was produced.

### **Available Stock / Inventory Control**

It is the Customer Specialist's responsibility to monitor and communicate office material needs; this would include standard office materials such as toner, paper, staples, etc.

### **Production Tracking**

Customer Specialists are responsible for identifying the job requirements; documenting the job requirements via the MailSoft application; coordinating the bid or estimate to perform the job; creating any necessary purchase orders required to obtain stock or materials; logging of received stock through the provided MailSoft application; invoicing the client for postage and work performed; track job progress through the logging in/out of tasks through the provided MailSoft application; coordinating the pick-up or disposal of extra materials.

### **Shipping (Sending and Receiving Responsibilities)**

It is the Customer Specialists' responsibility to be aware of incoming deliveries and outgoing pickups. This includes, but not limited to: tracking received materials/supply quantities received in the MailSoft application; changing job status to production ready; producing the necessary paperwork for local postal shipments as well as those sent out of the area via a trucking service. The Customer Specialist acts as a liaison between ALLMAIL USA, INC. and the United States Postal Service (USPS) representatives; helping to track and resolve any sending / receiving issues that may be identified. Occasionally, if the amount of mail does not meet the minimum trucking fees, the Production Technician will be asked to transport small amounts of mail to the post office.

### **Identify Problems and Suggest Improvements**

If while performing office-related tasks the Customer Specialist identifies any problems, they must identify potential solutions and attempt to troubleshoot the issue. Problems could be mechanical errors, safety issues, or an identified inefficiency. If the process of troubleshooting the issue could cause a loss of data or data integrity, the Customer Specialist should immediately ask for management assistance. Inability to resolve the issue should be escalated to management for additional assistance.

### **Workspace Cleanliness**

Customer Specialists are responsible for maintaining a safe and clean work environment. Walkways should be free of stock, tools, material, and debris; excess stock or materials should be discarded, stored, or staged to be returned to clients. Trash should be removed and discarded in the dumpster regularly. Recycling should be removed and transferred to the appropriate bins regularly. Allocated desk space in the office area is to be kept neat and presentable. Desktop computers should be locked when not at your desk. Client confidential information and sensitive jobs should never be left in the open and visible to other clients.

### **United States Postal Service (USPS) Equipment Handling**

Customer Specialists are responsible for the proper use and handling of all USPS Equipment. Stock is kept in a clean and orderly fashion; stock is not stored in an unprotected, outside location; stock is not removed from the premises without prior authorization from management.

### **All Other Duties as Assigned**

ALLMAIL USA, INC. may require a Customer Specialist to perform a task not specifically called out in this job description, therefore it is assumed to include "all other duties as assigned."

## **Customer Specialist Skills**

A successful Customer Specialist is a problem-solver and analytical thinker. They have exceptional attention to detail and a passion for producing quality, dependable work. In addition to these general skills and personality traits, ALLMAIL USA, INC. Customer Specialist candidates should have the following skills:

- Operation of office machinery such as computers, scanners, printers, fax machines, multi-function devices, etc.
- Strong written and verbal English communication skills
- Able to build and maintain strong customer / client relationships
- Ability to read and carefully follow instructions
- Ability to operate and navigate Windows based software
- Ability to operate and navigate Intuit QuickBooks software
- Ability to operate and navigate PDF software such as Adobe Acrobat
- Excellent attention to detail and good organization
- Capable of working independently to set and fulfill a production schedule
- Familiarity with postal rules governing parcel delivery requirements
- Ability to recognize incorrect/poor quality printing, and to communicate/correct