



## **Client Relations Assistant**

**Salary Range:** Starting pay, hourly

**Reports to:** Director of Client Relations

**Position Description:** This is a unique professional opportunity for an efficient, energetic and organized individual. Jameson is a leader in providing in-office comprehensive coaching, and other practice management products and services to dentists throughout the United States and the UK. The position requires the ability to gain a firm understanding of the Jameson Method, the ability to work easily in several venues as well as the ability to communicate in a highly educated professional market while focusing on very detailed information to assist in the process. This position requires an ability to be customer focused and have a firm understanding of all Microsoft Office programs.

### **Primary Responsibilities:**

1. Assist with the sales process by entering information, sending follow-up materials, scheduling calls, filling out monitors, and working with the Director of Client Relations on maximizing the sales process
2. Planning, scheduling and executing calls to clients and potential clients for potential sales
3. Assist with the marketing process by generating list, reports, monitoring returns, entering information, keeping the weekly marketing schedule on track, and working with the Exec VP Development on maximizing the marketing process.
4. Assist with the sales process by entering information, sending follow-up materials and mail outs, filling out monitors and reports, and working on continuous coaching letters, Send weekly reports to Executive VP of Development and President
5. Keep appropriate records and report to management on a weekly basis.
6. Participate in all sales programs as required by Management.
7. Carry out the Continuous coaching 90,60,30 campaign
8. Keep appropriate records and report to management on a weekly basis.
9. Participate in all sales programs as required by Management.
10. Participate in all training sessions and required meetings.

### **Specific Requirements:**

1. Participate in all sales programs as required by Management.
2. Enter referrals on lead list, and make sure the reference is kept in the loop
3. Execute all follow up from Jameson lectures, programs, webinars, seminars and conventions. Send all follow up out within one week of event.
4. Schedule appointments for the appropriate person(s) with all potential clients via inbound requests or lecture follow up.
5. Schedule QA calls with all clients bi-monthly and as needed
6. Maintain current leads sheet, weekly sales report, continuous coaching reports and client referral reports
7. Understand and work in the following process:
  - Sales Process Knowledge: Understanding the movement of the prospect through the steps of the sales process. Accurately identifying where the prospect is in the sales process
  - Reporting and forecasting: Keeping management abreast of developments in the sales process. Accurately forecasting sales projections and the value of deals. Records all conversations and contacts in Goldmine and can work with anyone on team to get them up to speed.
  - Deliver reports weekly to the appropriate people, Director of Client Relations, President, Exec VP of Development.
8. Obtain calls with the decision makers
9. Understand all Jameson products and services
10. Entering call notes and scheduling next appointment, emailing out necessary materials
11. Handle incoming calls/website emails promptly and provide excellent customer service
12. Assist with the scheduling of individual days of consulting/coaching as needed.
13. Prepare Continuous Coaching contracts for the coaches and send them out to the clients and coaches. All contracts will be linked to the

appropriate client card in goldmine. Execute Continuous Coaching letter campaign.

14. Schedule sales calls for others as needed
15. Follow-up on all referrals. Making sure to keep in contact with the person(s) who sent the referral.
16. Manage database, integrity management, run filters
17. Execute mailings
18. Conduct Mystery Patient calls and document calls appropriately.
19. Mail Thank you gifts to COE clients
20. Perform other team-oriented tasks as needed.
21. Seminars and Programs as needed
22. Participate in all training sessions

## **Client Relations Assistant**

If you're looking for a great opportunity on a career track with room for growth, this could be the position for you!!

The successful candidate is a bright, highly organized, self-starter who will enjoy the opportunity to be involved in all facets of a client relations role. In this role, you will assist the director in managing the workflow of leads, reports, customer service and other daily tasks.

We will provide you with training and a work environment that makes every day an opportunity to learn something new.

### **Qualifications**

- Assertive, self-motivated team player with great interpersonal skills, along with excellent oral and written communication skills.
- Should enjoy and/or have experience speaking in public.
- The ability to thrive in a fast-paced environment where you have to manage multiple projects, and have the organizational and attention-to-detail skills to do so.
- The intelligence and desire to learn and grow into a more senior position.
- Bachelor's degree
- 1 - 2 years experience and exposure to client services, sales, and/or marketing is a plus.
- Database management experience a plus (Goldmine, ACT, etc.)
- The ability to travel, 10% Travel
- Solid computer skills including Microsoft Word, Excel and Powerpoint