

May 22

## MISSION – SALES & CUSTOMER SERVICE ADMINISTRATOR

Increase enquiries entered, help the team pre-qualify potential customers to create ‘the list’. Be the first point of contact on the phone and manage the sales email inbox. Continually look for ways to develop yourself and the team by being active in weekly meetings, supporting the sales team by conscientiously managing busy and changing work load to help minimise risk entering the business to deliver sustained, profitable growth for the benefit of the whole Penta team.

OUTCOMES	
1	<b>Accurate and timely processing of customer enquiries</b> <ul style="list-style-type: none"><li>■ Quotation administration, entering on to Progress (ERP), producing “Penta” copies of drawings, preparing enquiry for full assessment.</li><li>■ Recording customer and enquiry details for handshake to the Estimator &amp; Account Manager.</li><li>■ Recording marketing information.</li></ul>
2	<b>Telephone and email ‘Gatekeeper’</b> <ul style="list-style-type: none"><li>■ Manage incoming calls and direct them accordingly.</li><li>■ Manage the sales inbox, answering customer questions and following the quote procedure.</li><li>■ Develop an understanding of Penta’s ideal customer persona to better identify good business opportunities.</li></ul>

<b>3</b>	<p><b>Accurately and timely processing customer orders</b></p> <ul style="list-style-type: none"> <li>■ Processing customer purchase orders, contract reviews, archiving and customer communication.</li> <li>■ Preparing Sales orders and sales / production “handshake”.</li> <li>■ Coordinating communications between customers, preparation, production and updating systems and hard copy paperwork.</li> <li>■ Good housekeeping of customer data.</li> </ul>
<b>4</b>	<p><b>Account based marketing to create a ‘list’ of potential A and B class customers</b></p> <ul style="list-style-type: none"> <li>■ Understanding Penta’s customer persona to focus time and effort in the right areas.</li> <li>■ Desk market research to create the ‘list’</li> <li>■ Develop social media connections and cold call to qualify the commercial potential in the list.</li> <li>■ Update the IMS (marketing automation) and Progress with contact details, preferences and qualifying notes.</li> <li>■ Pro-actively maintain “warm touches” with attractive clients.</li> </ul>
<b>5</b>	<p><b>Continuously improve how the department operates to aid growth and strengthen margin</b></p> <ul style="list-style-type: none"> <li>■ Embrace measures to know what a good day feels like.</li> <li>■ Collate departmental measures and statistics to develop understanding.</li> <li>■ Prepare, raise issues, debate and contribute in daily, weekly department L10 and quarterly State of the Company meetings.</li> <li>■ Complete weekly “To Do’s” and quarterly “Rocks”.</li> <li>■ Work on self-development.</li> <li>■ Create a network of great people you’d like to join the team.</li> </ul>

A business **is** its people. Healthy, smart, aligned team working is the key ingredient for Penta to thrive and deliver the best work life experience for its employees. Our “guiding lights” are the company’s Core Values, Penta’s business plan (V/TO) and Flywheel, together with the Lean principles of removing the 8 wastes and adding value.

Penta people need to be great technicians, communicators and collaborators. The company’s strength emanates from having disciplined people, engaged in disciplined debate and taking disciplined action in the best interests of the company and the whole team.

Penta people are **flexible**, have a **can do** attitude, make work **enjoyable** for all, we are **conscientious**, and we **strive for improvement** in ourselves and the company.

What does that look like in this job role?

**When communicating with customers:**

- ✓ Communicate with respect and do not talk down to people.
- ✓ Share & document structured call scripts, questions to ask, responses to overcome common objections, closing techniques, mentor and guide staff.
- ✓ Ask for help and brain storm with others when struggling with an account, someone may have “the key to unlocking the door”.

**Processing customer enquiries:**

- ✓ Being conscientious to efficiently deliver a consistent high quality of work.
- ✓ Learn from other about engineering drawings and specifications to develop personal skills.
- ✓ Try and resolve a problem before disturbing the estimating team.

**When processing customer orders and contract review:**

- ✓ Checking purchase order to quotation and drawing issue levels to save time later
- ✓ Be diligent, consistent “above the norm” quality starts at the beginning of the process.
- ✓ Plan administrative tasks outside prime telephone calling times to use time to the best effect.
- ✓ Be clear and honest when communicating with customers to uphold Penta’s reputation.

**Researching, contacting and qualifying new customers:**

- ✓ Using the information and processes in place, pro-actively research call and qualify potential new customers
- ✓ Help the Sales team find the ‘right’ kind of customers to ensure profitability goals are met
- ✓ Develop knowledge of Penta’ service to help find and develop new customers.

**Continuously improve by:**

- ✓ Positively contributing to develop the right KPI’s, it helps you know what a good day looks like.
- ✓ Let colleagues have their say, ask questions rather than make statements to improve understanding, consider different points of view and make better decisions.
- ✓ Read and learn the EOS way, improve technical, communication and collaboration skills, it delivers for “WIIFM”