

## Job Description / Performance Base Competency Assessment

**Position Title:** **Customer Relationship Representative**

**Position Reports To:** Director Customer Service

**Date of Origin:** January 19, 2010

**Date of Revision(s):** January 19, 2010

**Date Reviewed:** January 19, 2010

### Position Summary:

The Customer Relationship Representative is a primary contact person with the customer along with the Regional Sales Manager. These two will work as a team (the CRR working from the office and the RSM from the road) to service all aspects of the customers business with the company as detailed below.

**Education:** (Include licenses, certifications, permits) BS/BA Degree

**Experience / Qualifications** Degree in Marketing or Sales Related area preferred.

### Skills / Abilities

1. Must have a pleasant personality, ability to communicate easily and possess excellent telephone etiquette.
2. Must be analytical and demonstrate strong interpersonal skills.
3. Experience with Microsoft Word, Excel, Outlook, PowerPoint and good general computer skills required.
4. Foodservice and industry knowledge helpful but not necessary.
5. Good data entry skills a must with ability to work in a team environment.
6. Must be able to handle people with tact and skill.
7. Must be detail oriented and know how to prioritize workload.

### Physical Demands

Good physical and mental health, sound judgment, high moral standards and a sincere desire to work with individuals from varied backgrounds.  
Some travel required; approximately 10%

## Duties and Responsibilities

Rating

1 - 5

1. Frequent customer contact with a predetermined follow-up pattern:
  - a. Orders
  - b. New Products
  - c. Promotions
  - d. Price Changes
  - e. Inventory Status
  - f. Credit and Deduction Issues
  - g. Samples
  - h. Bid Pricing
2. Manage Order Entry and help input orders into system from purchase orders received via fax, phone or EDI. Be proactive in order entry (should know customers background and know what they really want, even if the order comes in wrong). Pull purchases orders from various portals on the Internet and process and transmit invoices in these same customer specific programs.
3. Review pricing in either promo assist or the bid query systems when orders are entered to resolve PO pricing issues.
4. Confirm orders back to customers (E-mail, EDI, FAX, etc.)
5. Process product returns and billing corrections in adage.
6. Communicate company pricing, freight and promotion announcements to customers in a timely way.
7. Coordinate all customer special pricing requests, including all bid requests.
8. Process all sample requests, then provide follow-up as to outcome and next steps relative to sample results.
9. Process monthly, quarterly and annual customer program and pricing check requests for payment.
10. Provide customer documentation and special reporting needs that may be requested. (Specifications, Nutritionals, POS Materials, Kosher Certs., etc.)
11. Assist in providing regularly scheduled account business reviews, with special attention to lost business, new business opportunities and customer profitability trends.
12. Periodically participate in Distributor Food Shows and Sales Meetings to enable a stronger working relationship with key account personnel.
13. Handle all customer letters and other correspondences.
14. Other duties as needed or required.

**Working Conditions**

- Physical Environment                      Well lit, well-ventilated cubicle that is close to other cubicle effecting concentration levels.
  
- Manual Dexterity:                         Walks, sits, stands intermittently during workday. Ability to key data into computer 80% of the day.
  
- Audible / Visual Demands:             Good auditory and visual abilities. Safe working environment. Must be able to tolerate frequent interruptions.

The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. This is not a comprehensive listing of all responsibilities and duties that may be assigned by the manager of this position.

**Overall performance / competency rating:**

- 1 = Deficient Performer
- 2 = Less than effective Performer
- 3 = Competent Performer
- 4 = Above Competent Performer
- 5 = Excellent Performer

Employee Comments:

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This Job Description / Performance Appraisal have been reviewed with me. I have made my comments and I ( ) Agree ( ) Disagree with the appraisal.

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Employee Signature

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Date

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Manager / Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Department Director / Divisional Vice President

\_\_\_\_\_  
Date

\_\_\_\_\_  
Director of Human Resources

\_\_\_\_\_  
Date