

**POSITION DESCRIPTION for WILL CALL SPECIALIST**

**IDENTIFYING INFORMATION**

**Job Title:** Will Call Specialist (WCS)

**Department:** Customer Service

**Reports To:** Customer Service Manager

**Regular Hours:** M-F; specific hours determined by supervisor

**FSLA:** Salaried Non-Exempt

**Effective Date:** 6/1/2020

**POSITION SUMMARY**

**PRIMARY PURPOSE**

The Will Call Specialist (WCS) greets and provides customer service to customers visiting, calling, and emailing our Will Call centers. This includes assisting customers with order pick-ups, placing of new orders, and technical support as engaging the Technical Service or Engineering associate for support as needed.

The WCS will also respond to customer emails and phone calls in a friendly and timely manner. These customer inquiries may include requests for new quotes and orders to be entered into the business system, to follow-up on existing quotes and orders, or for general product information.

**YOUR NUMBER**

For each position, Swagelok Northern California utilizes one key metric to drive success and provide clarity in decision-making. The key metric (“Your Number”) for this position is: **0 Service Level Agreement (SLA) breaches on customer tickets.**

**DUTIES AND RESPONSIBILITIES**

- **Solve Customer Requests.** Respond to, investigate, and solve customer inquiries, concerns, and issues via multiple channels in a timely and courteous manner.
- **Process Transactions.** Enter and manage Sales Quotations and Sales Orders into business system and provide appropriate technical and/or product-related information to support customer requests.
- **Coordinate with Coworkers.** Effectively communicate customer issues and concerns to all applicable internal staff members.
- **Maintain Customer Information.** Document all customer-related contacts, actions, and responses in ticketing system to ensure that responses are complete and meet customer expectations.
- **Learn Swagelok.** Maintain and develop working knowledge of products and/or services.
- **Proactively Utilize Reports.** Monitor and follow up on open order and backorder reports to proactively ensure we adhere to high standards of customer service.
- **Support Warehouse.** Perform warehouse functions for Will Call orders, including inventory picking and other system transactions required to complete the order.
- **Follow-up on Orders.** Monitor open sales orders in business system to ensure on time delivery.
- **Reduce Customer Obstacles.** Use internal supply chain resources to identify alternative parts and minimize lead times for customers.

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- **Find Solutions Cross-departmentally.** Collaborate with associates from other departments at Swagelok Northern California and Swagelok corporate personnel as needed to resolve customer escalations and issues.
- **Support Multiple Will Call Locations.** At the manager's discretion, work on site at our Fremont, Santa Clara, and Concord Will Call locations at any time to provide support for associates during lunch breaks, sick time, PTO, or surge in workload.

### EDUCATION AND EXPERIENCE

#### EDUCATION & CERTIFICATIONS

Bachelor's degree (B.A./B.S.) from four-year college or university; or equivalent combination of education and experience (required)

#### WORK EXPERIENCE

Two to four years' experience in a technical role focused on fluid system applications and/or two to four years' experience in a customer service role that includes technical sales experience.

#### SKILLS & COMPETENCIES

- **Computer savvy.** Proficiency in Microsoft Office applications (Word, Excel, Outlook, PowerPoint), especially Excel knowledge that includes:
  - Basic arithmetic formulas (addition, subtraction, multiplication, division)
  - Basic arithmetic functions (SUM, AVERAGE, COUNT, etc.)
- **Strong work ethic.** A sense of urgency to resolve customer requests.
- **Excellent customer service skills.** Ability to provide friendly service and rapid, high quality responses to customer inquiries.
- **Inclusive Communication.** Excellent verbal and written communication skills with customers and associates from diverse backgrounds.
- **Commitment to quality.** Willingness to take the extra time to go above and beyond the expectations in order to ensure accurate and reliable responses.
- **Organizational skills.** Ability to manage changing priorities and fluctuating workflow.
- **Informed Decision-making.** Ability to gather necessary information from all relevant sources and make decisions based in a timely manner.
- **Semi-independent Team Member.** Ability to work both independently and as a member of various teams and committees.
- **Precision.** Ability to understand and follow written and verbal instructions closely
- **Professionalism.** Shows up to work on time and in proper attire.
- **Can-do Attitude.** Unstoppable desire to learn from mistakes and respond to challenges with enthusiasm.

### ESSENTIAL VALUES FOR SUCCESS AT SWAGELOK NORTHERN CALIFORNIA

- **Respect.** Create an environment where people are trusted, respected, and treated fairly.
- **Innovation.** Challenge conventional wisdom to create new value for the customer.

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- **Customer Focus.** Create value for the customer in order to create value for Swagelok.
- **Integrity.** Choose to do the right thing with courage and character.
- **Quality.** Provide high value and high performance in our products, processes, and services.
- **Continuous Improvement.** Consistently do things better to enhance safety, savings, and productivity.

**PHYSICAL DEMANDS AND WORK ENVIRONMENT**

- Continually required to sit or stand
- Occasionally required to move around an office, production or warehouse environment
- Continually required to communicate with various stakeholders
- Continually required to read and view a computer screen
- While performing the duties of this job, the noise level in the work environment is typical of an office, production or warehouse setting.

**COMPENSATION**

*Below is the range that we in good faith believe is the range of possible compensation for this role at the time of this posting, based on market research and company needs. We may ultimately pay more or less than the posted range. This range is only applicable for jobs to be performed in California.*

**\$60,000-65,000/year** plus health, life and disability insurance, flexible medical spending program, Health Savings Account, two weeks' vacation per year, two weeks of sick pay per, year, company paid holidays, and matching 401k up to 4% of your gross income.