



## About Lateam Partners

Lateam Partners is a premier recruitment agency specializing in hiring top **English-speaking** talent in **Latin America** for U.S.-based companies. We connect skilled professionals with dynamic opportunities, offering competitive salaries, career growth, and the chance to work with leading international businesses.

By joining Lateam Partners, you gain access to **exciting remote roles, a supportive work culture, and ongoing professional development**. We pride ourselves on matching top-tier talent with high-quality employers, ensuring a rewarding experience for both candidates and clients.

If you're looking to advance your career with **a stable, well-paid, and growth-oriented opportunity**, apply today and become part of our thriving network!

[www.lateampartners.com](http://www.lateampartners.com)

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### **Job Title**

Onboarding Specialist

### **Location**

Remote

### **Client**

Undisclosed

### **Job Summary**

This position is responsible for turning qualified leads into clients by providing timely communication, organized onboarding, and clear coordination across the sales and training teams while maintaining accurate records, ensuring seamless transitions, and delivering a positive and consistent experience for every new client.

## **Responsibilities**

### Sales Support

- Serve as the first point of contact for incoming inquiries by phone, email, or chat during shift, providing a professional and timely response that sets a positive first impression.
- Qualify new leads quickly and accurately and schedule consultations with the Sales Manager or designated team member within our response time standards.
- Keep lead information organized and up to date by entering accurate details in our CRM and billing systems as part of your daily workflow.
- Support new clients during their setup process by handling billing steps, tracking installments, and logging comp sessions in coordination with the Operations Manager.
- Stay on top of the lead pipeline each day by reviewing priority reports, checking data for accuracy, updating follow-up status, and ensuring no lead goes without proper outreach.

### Client Onboarding

- Create, edit, and maintain complete and accurate client profiles in the CRM and shared systems so trainers and managers always have the information they need.
- Schedule and confirm initial sessions with trainers and make sure all details are communicated clearly to both clients and staff.
- Manage and update the New Client Sheet in real time to keep information accurate, visible, and easy for the team to reference.
- Notify the Operations Manager when bookings are needed at partner gyms or training studios and complete the required paperwork for client facility access.
- Act as the main point of contact between clients and trainers during onboarding, ensuring a smooth and coordinated handoff into their first sessions.

### Customer Experience & Retention

- Deliver high-touch customer service so every client feels valued and confident in their decision to join Focus.
- Guide clients through onboarding by answering questions and removing barriers to participation.

### Team Collaboration

- Work in tandem with the Sales Manager, PT Manager, Operations Manager, Client Service Manager, and Dietitian to complete the client onboarding journey.
- Share responsibility for consultations, profile creation, administrative updates, and CRM accuracy as part of a coordinated team process.
- Communicate clearly and promptly with all team members to ensure no gaps or delays in client onboarding and purchasing.
- Adhere to timelines and escalation protocols so that each client moves seamlessly through the process without disruption.
- Be willing to provide coverage during PTO, illness, or peak workload periods, as needed.

## Continuous Improvement

- Analyze onboarding and lead management processes; recommend improvements.
- Collaborate with leadership to standardize best practices and scalable systems.
- Support coverage for management team members during absences.
- Present problems with solutions already in mind

## **Qualifications**

- Associate's or Bachelor's degree in Business, Marketing, Sports Management, or related field preferred but not required.
- Personal Training experience is a plus, though not required. But knowledge of fitness and personal training/nutrition is required.
- 1–3 years of experience in client services, onboarding, or sales support (fitness, wellness, or hospitality industry strongly preferred).
- Strong organizational, time management and administrative skills with high attention to detail.
- Familiarity with CRM and scheduling software (e.g., Mindbody, Zen Planner, hubspot, Salesforce, or similar) preferred.
- Excellent communication skills, both verbal and written.
- Ability to manage multiple priorities and deadlines in a fast-paced environment.
- Passion for health, wellness, and fitness with the ability to represent the company's brand values.

## Core Competencies

- Client-Centered Mindset – Ensures every client has an exceptional first experience.
- Sales Orientation – Supports lead qualification and conversion processes.
- Collaboration – Builds positive rapport with trainers, managers, and clients.
- Operational Discipline – Maintains accurate and organized systems.
- Adaptability and problem-solving – Adjusts quickly to new tools, systems, and priorities.  
Is able to solve problems or propose solutions to problems effective

## **Apply to this position**

<https://forms.monday.com/forms/6f43e441a98a43154090ba9322b9091d?r=use1>