

Job Plan – Triage/Client Concierge

Overview of Position

This position requires triaging of support requests of Authorized Client Reps (ACRs) from several different areas from email/ticketing system/phone while ensuring user satisfaction and making sure that established service levels are met; Dispatching requests to internal technical resources as required.

Objectives

- Exhibit a sense of urgency when responding to client reps Authorized Client Reps (ACRs)
- Improve response time on service tickets (keeping client rep informed along the way)
- Assign clearly responsible person for each event
- VIP treatment (as perceived by ACRs)

Experience

1+ years in any customer service role

Reporting Structure

- Directly reports to CRM Manager

Essential Duties and Responsibilities

- Act as the single point of contact to the customer for all types of service requests
- Coordination of all IT support groups to ensure maximum utilization of resources
- Process service requests as they arrive through email, manual entry, or direct customer input
- Monitor resource schedules to ensure prompt time entry on service requests
- Communication with customers as required: keeping them informed of incident progress, notifying them of impending changes or agreed outages
- Responsible for maintaining ICG's information accurate in ConnectWise

Additional Duties and Responsibilities

- Improve customer service, perception, and satisfaction
- Fast turnaround of customer requests
- Ability to work in a team and communicate effectively
- Improve usage and increase productivity of IT support resources
- Escalate service requests that cannot be scheduled within agreed service levels
- Responsible for entering time and expenses in ticketing system as it occurs
- Understand processes in ticketing system by completing assigned training materials
- Enter all work as service tickets into ticketing system
- General clerical and administrative work as needed
- Keep client contact information (displayed within Client Concierge Dashboard in MS Teams)

Training

- Customer Service Basics
- Any Technology Type Training
- Extensive training in ConnectWise will be provided
- Extensive training in ICG Systems, Policies and Procedures will be provided

The parties acknowledge that this Job Description is part of and incorporated in the Employment Agreement:

Employee Signature: _____ **Date:** _____

International Consulting Group, Inc. (ICG)

By: _____ **Title:** _____ **Date** _____