

Customer Onboarding Specialist (COS)

Location	Remote	Benefits Eligible	Yes
Division	Success	Bonus Eligible	Yes
Department	Onboarding, Training, Support	Travel Requirement	25-75%
Position	Full Time		
Level	Specialist		
Salary	\$55,000 -\$75,000		

Job Description

Overview:

The Customer Onboarding Specialist (COS) is responsible for successfully onboarding new customers for Neway, LLC. The COS's performance is measured and rewarded based on new customer satisfaction levels, in the form of Customer Satisfaction Scores and Net Promoter Scores "NPS".

Responsibilities:

- Owns the entire new customer onboarding process from signed contract to paying customer for 120 days post go-live
- Works collaboratively with Sales, Vendors, Training, and Support to coordinate activities that maximize client satisfaction
- Acts as the operational point person for assigned new accounts to ensure they have a flawless startup experience
- Proactively evaluates customer needs and requirements to create optimal service delivery options for assigned at-risk customers who have serious concerns or challenges in doing business

Activities:

Customer Onboarding & Training Activities:

- Partner with Sales as soon as the target customer has been identified
- Learn from all parties involved what the value proposition is that has been presented to that customer as well as their key needs to ensure a seamless transition
- Understand all aspects of the Customer from the Sales Team, IT Connectivity, Billing and Customer Support perspective
- Evaluate all information received to complete organizational build and create an onboard plan based on what is learned
- Plan will include a key communication strategy, including leading regular calls during the client set up and launch process with other key leaders and lab vendor partners to ensure operational readiness
- Develop a strong working relationship with all external lab vendor leaders and internal functional leaders and stakeholders involved through regularly scheduled meetings
- Follow Neway's "Proven Process for Onboarding"
- Conduct follow-up or retraining sessions, if necessary
- Set up and monitor strategic accounts through the onboarding process

Customer Retention & Support Activities:

- Evaluate all information received and create a risk-repair plan based on what is learned
- Review client outcomes through monitoring and preparing for 90-day reviews
- Coordinate activities to maximize client satisfaction through a close-loop problem resolution process
- Attend “At Risk” conference and “Daily Ops Call” as needed to report resolution of any events for the key customers involved
- Function as a Customer Support Specialist when not onboarding clients
- Review and manage “Client Problem Tracking” module or other client problem reporting mechanism for at-risk accounts and coordinate action(s) between functional groups to resolve “At-Risk” issues in a timely manner
- Review the timeliness of the functional group’s response
- Notify the functional group immediately if the turnaround time goal is exceeded
- Monitor client service failures
- Review the root cause description and appropriateness of the functional group’s corrective action
- Notify the functional group if the resolution is unclear, inadequate, or inappropriate or if documentation is required
- Work with the group to develop an effective action plan
- Monitor new customer implementations
- Visit or conduct conference calls with client accounts and “At Risk” clients to ensure that the resulting resolution and follow-up activity is satisfactory
- Solicit and resolve other outstanding customer issues or concerns
- Spend 25-75% of the time in the field, visiting clients and working with the Sales team [there will be overnight travel]. All travel must be approved by the executive team
- In partnership with Sales, establish routine client visitation or conference call schedule (every 90 days) to meet with clients to review service metrics, satisfaction with local services, and address concerns
- Work with Customer Success Leadership or Customer Support Specialist to analyze chronic service failures and develop corrective actions. Coordinate the contact of clients who submitted a client satisfaction survey that expressed dissatisfaction with the problem resolution progress or as requested by the internal staff
- Ensure total compliance with all company policies and government regulations, maintaining required documentation
- Other duties as assigned-- this is not an exhaustive list of all duties and responsibilities, but rather a general description of work performed by the position

Required Education and Work Experience:

- Associate degree \ Bachelor’s degree or equivalent field experience (Required)
- Minimum four (4) years of successful customer service experience including responsibility for investigating, analyzing, and resolving customer concerns

Knowledge:

- Broad understanding of the laboratory business and its service requirements
- Broad knowledge of dialysis industry
- Broad knowledge of computing tools: Microsoft Word, PowerPoint, Excel, SharePoint, OneDrive, etc.
- Broad knowledge of clinical EMR systems (dialysis specific EMR systems)

Skills:

- Excellent interpersonal and communication skills (oral and written) necessary to effectively interact with customers and co-workers
- Ability to communicate complex issues clearly and concisely
- Strong effective presentation skills in a group setting
- Ability to multi-task and work in a fast-paced environment
- Strong organizational and prioritization skills
- Proven problem-solving skills with the ability to develop appropriate resolutions
- Ability to maintain a professional and tactful manner in stressful situations
- Proficiency in basic computer skills (Word, Excel)
- Ability to deal with client information in a confidential manner

Physical Demands and Conditions: The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Climbing:** Ascending or descending ladders and stairs using feet and legs and/or hands and arms
- **Balancing:** Maintains body equilibrium to prevent falling when walking, standing, or crouching on narrow, slippery or erratically moving surfaces
- **Stooping:** Bending body downward and forward by bending the spine at the waist
- **Kneeling:** Bending legs at the knees to come to a rest on the knee or knees
- **Reaching:** Extending hand(s) and arms(s) in any direction
- **Walking:** Moving about on foot to accomplish tasks, particularly for long distances
- **Pulling:** Using upper extremities to exert force in order to draw, drag, haul, or tug objects in a sustained motion
- **Lifting:** Raising objects from a lower to a higher position or moving objects horizontally from one position to another
- **Grasping:** Applying pressure to an object with the fingers and palm
- **Feeling:** Perceiving attributes of objects, such as size, shape, temperature, or texture, by touching with the skin, particularly that of fingertips
- **Talking:** Expressing or exchanging ideas by means of the spoken word
- **Hearing:** Perceiving the nature of sounds with no less than 40dB loss @ 500 Hz, 1000 Hz, and 2000 Hz with or without correction. The ability to receive detailed information through oral communication.
- **Repetitive Motions:** Moving the wrists, hands, and/or fingers
- **Visual Acuity:** Visual acuity requirements are critical in activities such as inspecting, testing, measuring, analyzing and transcribing. It is essential for an employee in this position to identify shape, size, motion and color of objects. Normal depth perception is required; normal field of vision is required