

POSITION DESCRIPTION

1. General Information

Position title	Membership Services Account Representative
Status	Non-Exempt, 37.5 Hours
Reports to (title)	Director for Society Management Services and Marketing
Department	Membership Services
Date	2/15/2017

2. Primary Function

Provides comprehensive customer service, transaction processing, registration processing, subscription fulfillment, claims processing, reporting, and related tasks. Assists with database configuration, migration, and handles database maintenance for assigned clients.

3. Major Duties and Responsibilities

Rank (add more as needed)	Duty/Responsibility	Percentage of time
1	Responds to all stakeholder inquiries received via various communication platforms to resolution. Informs stakeholders of products and services that may meet their needs, and performs various outreach campaigns to secure additional members, attendees, products, etc. in conjunction with the client team lead. Monitors client website, emails, and marketing materials, and meets with client team lead to stay informed of client programs and initiatives.	45
2	Coordinates a wide variety of database maintenance tasks, including, but not limited to, configuring member types, adding products, assigning committees, entering address updates, sending renewal notices, developing email campaigns, etc.	20
4	Produces data, reports, and other information as needed, to assist the client team lead in developing strategies to increase membership, subscriptions, attendees, etc.	20
5	Prepares and updates written documentation of client procedures and policies, provides a calendar of all regularly occurring tasks and all contacts that are dealt with, and updates client teams as needed of potential process, procedure, or policy changes.	5
6	Provides quality assurance and quality control on database setup performed by IT. Reviews the setup from an end user perspective and provides feedback to IT.	5
7	Participates in client teams and team meetings to ensure clear communication and understanding of the client's goals and expectations.	5

Incumbent is expected to perform other duties as assigned by their immediate supervisor in support of the organization's goals and FASEB's needs.



4. Direct Reports

Position titles of direct reports	# in position	# supervised by direct reports	
		Exempt	Non-exempt

5. Knowledge & Skills

Indicate the minimum education level (or equivalent experience) required in your position.		List the skills applicable to your position and indicate the minimum proficiency required: A= Novice; B= Proficient; C=Expert		
Check those which apply		Subject or major field of study	Skill (Specify equipment/system, e.g., MS Word, Communication Skills, Customer Service)	Minimum Proficiency
x	High school (with relevant college courses)	Business, Accounting	Customer Service Skills	C
	Prof/technical		Written and Verbal Communication Skills	C
	College courses		Ability to Multitask	C
	Bachelor's degree		Organization and Time Management Skills	C
	Master's degree		Microsoft Outlook, Word, Excel	B
x	Other	2-4 years' relevant experience.	Database Management Skills	B
			Internet Navigation	B
			Adaptable to Working with New Software	B
			Attention to Detail	B
			Ability to Meet Deadlines	B
			General Accounting Knowledge	A

6. Key Decisions & Guidelines

Give two or three examples of decisions you make or actions you may take without prior approval.	Performing stakeholder profile updates. Responding to stakeholder inquiries. Sending out a missed journal.
Give two or three examples of decisions you refer to a higher authority.	Approving an email blast. Send out renewals. Change database configurations.
Indicate any special policies, formal procedures, or precedents that guide your work.	PCI Compliance. Client business rules, policies, and procedures. Society Management Services Handbook.



FASEB

Federation of American Societies
for Experimental Biology

7. Working Relationships		
Position	Department/Organization	Purpose (What is important is the content of these interactions. Describe what happens as a result of these contacts)
Executive Directors / Business Managers	FASEB SMS and/or external clients	Serves as main point of contact between the incumbent and client. Provides overall direction and guidance and receives regular reports used to monitor various metrics and benchmarks.
Accountant	FASEB Accounting and/or external vendor	Provides accounting parameters to be used for tracking of financial activity. Is the recipient of regular financial reports from databases for use in bookkeeping.
Meetings Manager	FASEB OSMC and/or external clients/vendor	Supplies instructions and parameters for setting up and managing meeting registration functionality. Receives registration reports.
Account Representatives	Membership Services	Collaborates with departmental colleagues to develop new database skills and identify process improvements.
IT Staff/Webmasters	FASEB IT and/or external vendor	Provides database training and ongoing consultation. Liaisons between FASEB and database vendors. Collaborates with incumbent to create and modify society web pages and troubleshoot web site functionality issues.
Publisher's Representative	Various Journal Publishers	Produces and delivers regular reports for use by publishers to provide journal content to members and subscribers.

8. Working Conditions
<p>This position requires sitting (80%), standing (5%), and walking (15%). Additional physical requirements are as follows:</p> <ul style="list-style-type: none"> Occasionally requires lifting materials of approximately 20 lbs Requires computer work involving extensive use of keyboard, mouse and monitor
<p>Work Environment/Conditions:</p> <ul style="list-style-type: none"> Dayshift hours primarily Travel may be required Possible work related assignments on weekends