

Member Services Representative



EMPLOYEE:

STATUS: Non-Exempt

REPORTS TO: Manager, Member Services & Tax Store

DATE: September 2020

Position Summary

The Member Services Representative assists members with membership applications and renewals; with event registrations; with tax store orders; with research service referrals; and any other questions or assistance they require. Provide clerical and other support in all member service department functions.

Principal Duties and Responsibilities:

1. Answer incoming calls & assist members and other callers with service requests, e.g., membership, registrations, orders, referrals to other departments, etc.
2. Accurately process batches of membership, registration and tax store order transactions in accordance with standard operating procedures.
3. Provide support as needed for mail processing, deposits, updating of records, clearing e-mail from general e-mail boxes; membership packets; registration packets and fulfillment projects.
4. Assist with event setup projects as needed.
5. Assist with database input projects as needed, such as demographic information, surveys and member-record cleanup.
6. Primary person responsible for new member calls. Pull lists, make calls, coordinate follow ups and track statistics.
7. Assist team on projects to help with membership growth and retention, as well as daily operations.
8. Assist with registration projects to help with registrants and instructors, as well as daily operations.
9. Assist in other areas of Association as requested by supervisor or her designee(s).
10. Maintain and enhance proficiency with all facets of NetForum, our Association Management software.
11. Maintain and enhance proficiency with Microsoft Word and Excel.

Additional Duties and Responsibilities:

- Provide support for other projects and administrative tasks, as needed.

Knowledge, Skills and Abilities

Reasonable grammar and spelling proficiency; Experience with Microsoft Office Suite; Keyboarding skills; Communication skills; Good telephone personality; willingness to increase knowledge in skills and in all areas regarding the Association.

Minimum three years of customer service and office support experience; must be able to efficiently and effectively utilize technology to enhance service activities; deal effectively, confidently and cordially with a wide variety of people and situations, both pleasant and unpleasant; communicate effectively verbally and in writing; deal effectively with time pressures, stress and rapid change; exercise mature judgment in providing information to members, vendors and other NATP publics; must be business-like in appearance and demeanor.

NATP Values and Core Competencies

Integrity	Collaboration	Objectivity
Open-mindedness	Mutual Respect	Innovation
Fiscal Responsibility	Fun	Community
Honesty	Member Focus	Accountability

NATP aspires to, and consciously works towards, building a healthy organizational culture. While not all encompassing, the values listed above shape and influence all our decisions and actions and exemplify the type of conduct expected of all staff members. These values are considered core competencies, and as they are performed by employees will contribute directly to our goal of excellence in practice. As with

any other job responsibilities outlined in this document, you are expected to respect, promote, and demonstrate these values in the performance of your job. **All employees are accountable for adhering to our mission, vision, and values while performing the essential duties and responsibilities of their job.**

Working Conditions

Work is performed in an office or home office environment with minimal exposure to injury. Work hours are normally Monday through Friday and will usually average 40 hours a week; however, occasional overtime maybe needed to meet the needs of the business. Some unscheduled evening and weekend work will be required due to nature of the position. Some business travel may be necessary to execute the duties and responsibilities of this position.

Acknowledgement

This job description describes the general nature and level of work performed by the employee assigned to this position. It does not state or imply that these are the only duties and responsibilities assigned to the job. The employee may be required to perform other job-related duties as requested by the Director of Member Relations, Manager Member Services, or Management Team. All requirements are subject to change over time and to possible modification to reasonably accommodate individuals with a disability.

I acknowledge that this job description is neither an employment contract nor a legal document. I have received, read, and understand the expectations for the successful performance of this job. NATP employees are required to adhere to the NATP values in all their interactions with members, vendors, and fellow employees. As an employee, I will strive to embrace the values and uphold the mission and vision of the organization.

Employee Signature

Date