

# Client Services Specialist

**Reports to:** Director of Client Services

## **JOB DESCRIPTION**

### **Summary/Objective**

The Client Services Specialist will build client relationships and manage the overall implementation process of new customer accounts, customer service and program add-ons to existing accounts. The Client Services Specialist will also monitor both internal and external deliverables to ensure excellent value, access and use of the product by the customer.

### **Essential Functions**

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Facilitate onboarding of new customers to MyHealth products
2. Utilize Customer Relations Management (CRM) tool to track sales, onboarding history, integration, project progress/control and contacts to ensure an accurate data base and timely reporting to management.
3. Lead and schedule internal and external (customer-facing) implementation meetings and ensure that project plans and tasks are completed in a timely and accurate manner.
4. Coordinate integration process by supporting the Integration Specialist to integrate the customer's electronic medical record data
5. Coordinate customer training with Director of Client Services
6. Assist with special projects that drive design innovation and create products that help customers improve patient care or identify new markets.
7. Participate in activities needed to support the management functions of the team.

### **Competencies**

1. Strong Emotional Intelligence
2. Collaboration/Teamwork Skills
3. Organizational Skills
4. Communication Proficiency
5. Problem solving skills
6. Time management
7. Effective written and spoken communications
8. Facilitation Skills

**Supervisory Responsibility**

This position has no supervisory responsibilities.

**Work Environment**

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets, fax machines, paper binders and paper cutters.

**Software**

MS Office, project management, customer relations management (CRM), and health information technology.

**Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms. The employee is required to lift a maximum of 30 pounds.

**Position Type/Expected Hours of Work**

Some flexibility in hours is allowed, but the employee must be available during the "core" work hours of 9:00 a.m. to 3:30 p.m. and must work 40 hours each week to maintain full-time status.

**Travel**

Local and statewide travel varies depending on customer assignment.

**Required Education and Experience**

High-School diploma required. Bachelor's degree, or relevant health information technology experience preferred.

1. Experience organizing and facilitating meetings
2. Experience data base input
3. Experience managing milestones, sub tasks, and supporting documentation
4. Experience with sales documents, training documents and report requirements.

**Preferred Experience/Certification**

1. Bachelor's Degree
2. Medical records, nursing, and/or medical background.
3. RHIA/RHIT certification.

**Additional Eligibility Qualifications**

None required for this position.

**AAP/EEO Statement**

MyHealth expressly prohibits any form of unlawful employee harassment based on race, color, religion, gender, sexual orientation, national origin, age, genetic information, disability or veteran status.

**Other Duties**

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice