

**Building Performance Institute, Inc.**  
**Client Relations Representative Position Description**

**Job Title:** Client Relations Representative  
**Department:** Client Relations and Operations  
**Reports To:** Manager of Client Relations  
**FLSA Status:** Non-Exempt

**Summary:** The Client Relations Representative advances BPI's success by addressing questions, offering information about our products and services, resolving problems, and addressing complaints. The CRR is the customer's primary point of contact via phone, email, or other channels. CRRs are experts in BPI's products and services, and have a vital role in helping customers understand and use our offerings. Mostly daily work is remote, with occasional onsite work or training responsibilities. **Must be physically located within the Capital District of New York State and/or Saratoga County.**

**Essential Duties and Responsibilities** include the following:

- Maintain a positive, empathetic, and professional attitude toward customers
- Respond promptly to customer inquiries through various channels
- Acknowledge and resolve customer complaints, escalating when appropriate
- Know our products inside and out so that you can answer questions and provide solutions
- Process purchases, forms, orders, certifications, exams, and account changes
- Enhance your skills with provided trainings and help colleagues learn when needed
- Maintain a professional, collegial, and supportive team environment
- Use a variety of IT tools and platforms to complete your work, learning new skills and systems when needed
- Understand each customer's needs and suggest appropriate BPI products
- Work independently and as part of a team
- Ensure that management is kept current on all issues that could affect business, including internal and external relationships
- Occasional assistance with conference preparation, including handling and shipping boxes and crates heavier than 25 pounds
- Other duties as assigned

**Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Equal Opportunity Employment:**

Building Performance Institute is an Equal Opportunity Employer. We are committed to providing an environment of mutual respect where equal employment opportunities are available to all applicants

and teammates without regard to race, color, religion, gender, sex, and any other characteristic protected by applicable law. At BPI we believe that diversity and inclusion among our teammates is critical to the success of our mission, and we seek to recruit, develop and retain the most talented people from a diverse candidate pool.

**Education/Experience:**

High School Diploma or general education degree (GED), and one year of customer service or call center experience.

**Language Ability:**

Ability to read and comprehend instructions, business correspondence, and memos. Ability to write business correspondence. Ability to present information in one-on-one and in small groups to customers, clients, and employees. Effective and empathetic verbal communication. English is the primary language used by the company; fluency in additional languages is a plus.

**Math Ability:**

Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages.

**Reasoning Ability:**

Problem solving, common-sense reasoning, patience. Ability to understand data provided in written or spoken forms and use it to solve problems. Time management and organization skills. Ability to delegate and manage multiple tasks and projects.

**Computer Skills:**

Knowledge of Microsoft Word, Excel, PowerPoint, and Outlook is required. Prior experience with CRM systems and/or SharePoint is a plus.

**Work Environment:**

Work is primarily remote. Occasional onsite is required for training and other needs. Onsite work is typically in an office environment, with some work in storage units for conference preparation. The noise level in the onsite work environment is usually low to moderate.

**Physical Demands:**

The employee is regularly required to remain in a stationary position, operate a computer, and communicate with customers and colleagues using email and phone. The employee must occasionally move cases of books and printed materials weighing up to 25 pounds, position self around offices and storage areas, and prepare wheeled cases of conference materials weighing up to 100 pounds for shipping.

**Position Description Acknowledgment:**

I acknowledge that I have received a copy of the position description. I will read the position description and ask questions if I need additional information regarding items covered in the position description.

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Name (print)

Date

Signature