



Office Coordinator

Mission of the Office Coordinator

Assist in the operations of the office so extraordinarily that management is wowed by your coordination skills. You will do this by being in charge of our clients' and prospects' first impressions of the agency, this role helps support each and every department within the agency. This includes, but is not limited to, office support, technology, human resources and marketing.

Desired Outcomes of This Role

1. Be the first line of defense on answering all phone calls
 - a. Find out what the customer is looking for and if the person is unavailable, find someone who can help them immediately
 - b. Defend the team's time by routing calls to the best person to help the caller
 - c. Conduct warm transfers of callers to the team
 - d. When available, suggest another line of coverage to callers before transferring the call
 - e. Take full and complete messages from callers
 - f. If calls are missed, transfer calls quickly to Account Managers
 - g. Maintain the night attendant and messages when the office is closed
2. Maintain the office
 - a. Make sure the lobby and conference rooms are tidy and prepared for meetings
 - b. Greet visitors to the office
 - c. Take information from solicitors
 - d. Maintains inventory of office supplies; orders new supplies as needed
 - e. Order wellness snacks for the office on a bi-weekly basis
 - f. Performs or oversees the maintenance of office equipment including cleaning and repairs
3. Assist in the coordination of the Office
 - a. Order additional boxes and schedule pick ups from Iron Mountain
 - b. Change the water filter in the kitchen every 6 months
 - c. Set up carpet cleaning every April and October
 - d. Assist in the annual mailings of our Calendars
 - e. Help coordinate employee events
 - f. Distribute unrouted attachments
 - g. Update the agency vacation calendar weekly
 - h. Assist with onboarding and offboarding of employees
4. Handle all mail
 - a. Attach the mail to the management system with a task for the right party
 - b. Take out the mail at the end of each day to the box in the parking lot
 - c. Maintain the postage meter supplies and updates
5. Assist in agency reporting
 - a. Every Monday prepare the report spreadsheet to send to management
 - b. Assist management in preparing other reports as needed
 - c. Attach commissions statements to agency management systems



- 6. Assist with IT Support
 - a. Coordinate IT support by contacting our IT support team to start a ticket, track to completion
 - b. As needed, contact Agency management system to assist employees with issues
 - c. Manage daily company downloads and ensure updates are populated throughout the system
- 7. Assist in the Marketing of the agency
 - a. Assist in the creation and distribution of the company newsletter social media efforts
- 8. Assist the benefits department in day to day activities
 - a. Assist in updating client management system and quoting systems
 - b. Assist in sending out and tracking invoices/disclosures to clients monthly
- 9. Other responsibilities as directed by your manager

Key Performance Indicators (Metrics)

Key Performance Indicator	Current	Goal	Date to Track	Method to Track
Task Completion		100 %	Quarterly	1-on-1 assessment
Employee Support		9+	Quarterly	1-on-1 assessment
Time management		8+	Quarterly	1-on-1 assessment
Positivity		9+	Quarterly	1-on-1 assessment

Values

- C- **Commit** to going the extra mile for clients and co-workers.
- O- Take **ownership** of the client's needs, agency goals, and your career development.
- M- Embrace a positive **mindset**.
- M- **Manage** your time responsibly, it's your biggest resource.
- I- **Integrity**- do the right thing, always.
- T- **Thrive** in your personal and professional life, celebrate your WINS!

Critical Competencies

Efficiency	Able to produce significant output with minimal wasted effort.
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Organized & Planning	Plans, organizes and schedules in a productive manner. Focuses on key priorities.
Persistence	Demonstrates tenacity and willingness to go the distance to get something done.
Proactivity	Acts without being told what to do. Brings new ideas to the company.
Flexibility/Adaptability	Adjusts quickly to changing priorities and conditions. Copes effectively with complexity and change.
Calm Under Pressure	Maintains stable performance when under heavy pressure or stress.
Enthusiasm	Exhibits passion and excitement over work. Has a can do attitude.
Openness to Criticism and Ideas	Often solicits feedback and reacts calmly to criticism or negative feedback.
Listening Skills	Lets others speak and seeks to understand their viewpoints.
Communication	Speaks and writes clearly and articulately without being overly verbose or talkative. Maintains this standard in all forms of written communication, including emails.
Teamwork	Reaches out to peers and cooperates with supervisors to establish an overall collaborative working relationship.

Feedback:

- Every 90 days you will meet with your manager to review any bottlenecks, ideas you have to improve and the objectives outlined in your job description.
- Each year you will receive a formal review.