

Position Summary

The Implementation Specialist is responsible for overseeing all aspects of the intaking clients and ensure their smooth transition onto Green Leaf Payroll and Business Solutions platform. Interact with customers to provide information in response to inquiries about products and services and handle all onboarding processes.

Essential Duties and Responsibilities

The essential functions include, but are not limited to the following:

- Confer with customers to provide information about products or services and necessary paperwork for intake.
- Contacting clients frequently to obtain required business documentation such as their Employer Identification Number (EIN).
- Researching and resolving service related questions, concerns, and problems for clients in a friendly and timely manner.
- Maintaining a high rate of client retention through quality service.
- Communicate initial set up costs and any other associate fees.
- Coordinate first meeting or contact between the client and their payroll manager.
- Establishing and maintaining a positive working relationship with clients, agencies, and coworkers to promote a quality service image
- Refer unresolved customer grievances to designated departments for further investigation.
- Train clients on all systems associated with processing payroll and onboarding of their employees
- Performing other duties as assigned

Minimum Qualifications (Knowledge, Skills, and Abilities)

- Associates degree in accounting, business, or a related field; or equivalent combination of education and experience
- 4+ years of office experience or similar work environment
- Strong organization, oral, and written communication skills

- Ability to work independently and manage multiple projects and deadlines
- Strong computer aptitude, which includes expertise with Microsoft Excel and Word as well as experience with Accounting software, is a must
- Ability to analyze data with particular attention to detail
- Proven ability in customer service and problem resolution
- Excellent written, oral, and presentation communication skills
- Strong customer service orientation

Physical Demands and Work Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the functions. While performing the duties of this position, the employee is regularly required to talk or hear. The employee frequently is required to use hands or fingers, handle or feel objects, tools, or controls. The employee is occasionally required to stand; walk; sit; and reach with hands and arms. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this position include close vision, distance vision, and the ability to adjust focus. The noise level in the work environment is usually low to moderate.

Note

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employees will be required to follow any other job-related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments. All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. Some requirements may exclude individuals who pose a direct threat or significant risk to the health or safety of themselves or others. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

The company is an Equal Opportunity Employer, drug free workplace, and complies with ADA regulations as applicable.

