



Title: Project Coordinator
Classification: Full-time non-exempt, permanent hourly
Department: Operations
Reports to: VP of Operations
Date revised: June 4, 2021

Objective:

Keep our consultants organized, supported, and informed while providing excellent service and communication to our clients.

Summary:

The Project Coordinator is the central hub for client engagements with our consulting team. They keep our consultants organized and supported, so they can focus on the client in front of them; they keep our clients informed about their ongoing status, so they know we haven't forgotten about them when we're focused on other clients. This vital operational asset creates and manages our project records in Salesforce and central server for easy reporting and document recovery. This person handles sensitive business information confidentially and communicates with clients in a timely and effective manner.

Essential Functions:

- Coordinate workflow and communication for consulting team, including scheduling calls with multiple clients/consultants while observing multiple time zones and responding appropriately to client emails in a timely manner.
- Set up client records and ensure all necessary information and documents are gathered appropriately, researching the client in various public and regulatory databases as needed.
- Conduct client onboarding calls and set appropriate expectations for consulting process while communicating value proposition; review progress with client as needed.
- Maintain Salesforce records to produce accurate, insightful project reports.
- Develop and maintain Salesforce workflows for efficient client service and contact.

Required Knowledge, Skills, and Abilities:

- Professional communication skills, reads and replies to emails in a timely manner, speaks clearly and effectively
- Advanced knowledge of Microsoft Office Suite: Word, Excel, PowerPoint, Outlook, Teams
- Working knowledge of Salesforce CRM or similar relational database
- Research and reporting skills
- Time management



- Self-organized, self-motivated

Education and Experience:

Bachelors Degree required

2 years' experience in an administrative support or project coordinator position

Position Breakdown

- 30% project management, data entry, and support work
- 50% customer service and communication
- 20% applied to database administration, report development and workflow design

Physical factors & working conditions: Full-time non-exempt, some overtime may be required; office environment, hybrid remote possible with manager's approval; no travel required

Compensation and Benefits:

- Salary/wage DOE
- Medical Vision Dental, 401k with 25% employer match
- Company lunches, snacks, team-building events
- Company holidays (including employee's birthday) and accrued PTO

