



Services Management Specialist

Job Description

Job Overview

This position plays a vital role on the Services Management team by helping to coordinate, track, and maintain systems and processes that increase efficiency and improve the user experience; track and manage details across multiple projects; support learning events, tools, and resources; keep customer relationship management records clean and up to date; and organize resources in ATD's shared learning platforms. The position reports to the Executive Director, Services Management and supports the Associate Director of College Relations as well as ATD's Vice President, Network Engagement as requested.

The functional competencies for this position require someone who has strong technical skills and attention to detail.

Duties and Responsibilities

Operations & Sales Support (60%)

- Manage the maintenance of Salesforce records and report administration including tracking opportunities, creating dashboards, and reports.
- Monitor and analyze marketing campaigns as assigned and use the information to create leads with extensive notes and tasks added to Salesforce.
- Provide planning and implementation support to the sales team by assisting with meeting preparation, attending weekly sales meetings, recording meeting notes, updating Salesforce, organizing documents, and tracking action items and tasks in Salesforce as directed.
- Work collaboratively with teams across ATD to ensure records in Salesforce are updated and accurate that enables the customer relationship managers to complete in-depth client research, support strategic client communications/opportunities, and grow relationships with our colleges.
- Support colleges in opening and closing the administration of the online Institutional Capacity Assessment Tool (ICAT), accessing supporting resources, and producing response distribution and summary reports.
- Monitor, maintain and update ICAT organizational email accounts, ensuring communications are directed to the appropriate person with timely customer response.



- Maintain the ICAT Courses in ATD Connect (Canvas) including enrollment of out of network colleges as appropriate.
- Provide maintenance and user training support that enhances the use of software applications and digital tools that support sales enablement, including Canvas, Qualtrics, Salesforce, and the ATD Coach Portal.
- Support and provide input to the design, planning, and facilitation of webinars and trainings on services management tools and resources.

Contract Administration (30%)

- Ensures that contract information in Salesforce is entered correctly and is consistently updated
- Create, manage, and track custom coach assignments, contracts, and opportunities in Salesforce.
- Provide support with the operational oversight of coaching contract development, expense management, and mandatory coach deliverables.
- Ensure all technical contractual requirements are captured in Salesforce including grant requirements and deliverables when applicable.
- Manage the college contract and invoicing process to move items through pipeline in timely manner.
- Track coach deliverables and summarize findings in Salesforce.

General Operations (10%)

- Participate in staff meetings, attend events, and otherwise contribute to strengthening the impact of the team and organization.
- Engage in professional development opportunities to enhance knowledge of ATD program and services.
- Collaborate with staff in supporting the execution of ATD's strategic plan.

Skills/Qualifications/Experience

- Associate degree or higher in a technical or business-related field and 4 years in a sales or services support environment or an equivalent number of years or related experience.
- Prior experience with sales cycles and the ability to influence the process to deliver business results.
- Ability to collect, process, report and manage a variety of quantitative and qualitative data.
- Ability to effectively communicate in writing



- Ability to evaluate data quality and perform data-cleaning operations.
- Experience assisting in the development, administration, and collection of surveys and questionnaires.
- Excellent time management, problem solving, and organizational skills.
- The capacity to multitask and manage multiple projects and assignments, often with competing deadlines.
- Demonstrated proficiency in the following tools: Salesforce CRM (Customer Relationship Management), Qualtrics, Excel and Tableau, Microsoft Office Suite, and LMS (Learning Management System) such as Canvas.

Competencies

Collaboration: Demonstrates respect, humility, and willingness to collaborate when seeking to understand others and making decisions.

Disciplined Execution: Has the ability to break down big picture work goals into management tasks; has the foresight to anticipate potential roadblocks to ensure timely completion of tasks and projects.

Effective Communication: Ability to actively listen and thoughtfully question to create greater understanding and to offer insights that advance problem-solving.

Learning Orientation: Embraces challenges, new ideas and different perspectives as an opportunity to learn; continually seeks out and applies new learning to activate change or improvements.

Systems Thinking: Defines the system and one's role in the system. Sees relationships and the dynamic elements of the holistic system and executes work accordingly. Influences the system and maps connections to ATD's external landscape.

Change Agent: Serves as an agent of change at a personal, team, and organizational level to pursue outcomes for students. Adapts as the environment changes, while managing associated risks. Motivates staff, team, organization, and partners to activate the change needed to advance defined priorities.



Culturally Competent: Models appreciate inquiry to gain understanding and awareness of others' cultural identity and practices. Creates safe and constructive forums for sharing diverse perspectives and opinions.

Emotional Intelligence: Demonstrates self-awareness and self-regulation and recognizes impact of personal behavior on others.

Position Details

Position Type: Full Time, Exempt
Salary Grade: 5
Work Location: Silver Spring, Maryland
Travel: Minimal

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. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus. The noise level in the work environment is usually moderate. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties of this position.

Equal Opportunity Employer

At Achieving the Dream, Inc. (ATD) we strive to attract, develop, and retain highly qualified and diverse individuals. ATD is committed to creating and maintaining a diverse work environment and is proud to be an equal opportunity employer. Employment policies and decisions at ATD are based upon merit, qualifications, performance, and business needs. All qualified candidates will receive consideration for employment without regard to age, race, color, national origin, gender (including pregnancy, childbirth or medical conditions related to pregnancy or childbirth), gender identity or expression, religion, physical or mental disability, medical condition, legally protected genetic information, marital status, veteran status, or sexual orientation.

7/23/2021



Achieving the Dream™