



## POSITION DESCRIPTION

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**POSITION TITLE:** Inside Account Manager (Levels 1, 2, 3, & Senior)  
**DEPARTMENT:** Account Services

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### REPORTING RELATIONSHIPS

**FLSA Status:** Non-Exempt

**POSITION REPORTS TO:** Account Services Manager, Account Services Assistant Manager  
**POSITIONS MANAGED:** None

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### POSITION PURPOSE

This individual is responsible for maintaining customer relationships through managing aspects of the order cycle. Responsibilities will specifically be focused on communicating directly with customers or members of the sales team to ensure that orders are correctly processed, updated, maintained and delivered. This individual will need to frequently use and maintain an adequate business knowledge in regards to pricing, inventory, and retailer requirements, which can change frequently. This individual is responsible for investigating and pro-actively reducing non-compliance charges for their given territory (Retail channel). This individual is highly proficient with Excel and has knowledge of pivot tables, formulas including VLOOKUPs, search functions and conditional formatting. The individual will also demonstrate excellent analytical, communication and organizational skills, high accuracy, attention to detail, and will contribute to a positive team atmosphere.

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### POSITION QUALIFICATIONS AND JOB DUTIES

#### QUALIFICATIONS AND EDUCATION REQUIREMENTS:

1. Associate's or Bachelor's degree or equivalent work experience.
2. Minimum of 2 years of experience in a Sr. Sales Order Entry role, Inside Sales, or Account Management.
3. Highly proficient in Excel, SAP experience is a plus.

#### JOB DUTIES:

1. Directly communicating pricing information, including discounts and current promotions, and using this information to maximize sales within designated territory.
2. Answering questions regarding order information, shipping issues and non-technical product information.
3. Manually enter daily orders (Professional Channel) or process orders daily received by EDI (Retail Channel).
4. Confirming inventory availability and working with supply chain and Retail/Professional Sales.
5. Track order status from beginning to end, issuing RGA's (Return Goods Authorization) and scheduling pick-ups when needed. Process and research sales credits/debits and freight claims.
6. Keep all territory notes/contacts updated and pull the area report weekly.
7. Review retailer compliance manuals for updates and communicate necessary changes to appropriate departments (Retail channel).
8. Work closely with the designated sales team to develop and execute a plan on sales orders, leads, and opportunities (Professional channel).

9. Attend product training classes and maintain sufficient knowledge for all product lines.
10. Analyze non-compliance fines and monthly scorecards to identify trends. Work with internal and external teams to implement changes to reduce chargebacks (Retail channel).
11. Assist and/or lead process improvement projects within the department.
12. Create customs paperwork for international shipments.
13. Back-up and support team members during absences and/or heavy volume times.
14. Able and willing to work necessary hours to meet all project deadlines, travel when necessary.
15. Other Duties- Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

#### **LEVEL PROGRESSION:**

In order for progression to occur from one level to the next all requirements must be met.

#### LEVEL 2

1. Demonstrate a comprehensive knowledge of the processes within the department and be trained as a designated back-up for at least two main processes, including but not limited to:
  - ✓ Invoicing/Sales Report
  - ✓ PM upload
  - ✓ Rebates/Commissions
  - ✓ New item setup/Pricing
  - ✓ EDI Maps (Retail-Specific)
  - ✓ Margin Report on orders
2. No documented performance or attendance issues within the previous 12 months.
3. Receives a “meets” or “exceeds” on the previous bi-annual performance evaluation.

#### LEVEL 3

1. Designated trainer for new employees and/or on new processes
2. Demonstrate a comprehensive knowledge of the processes within the department and be trained as the main contact or designated back-up for all of the processes, including but not limited to:
  - ✓ Invoicing/Sales Report
  - ✓ PM upload
  - ✓ Rebates/Commissions (Retail-Specific)
  - ✓ New item setup/Pricing
  - ✓ EDI Maps (Retail- Specific)
  - ✓ Margin Report on orders
3. RETAIL ONLY - Able to complete the EDI mapping for designated territory.
4. PROFESSIONAL ONLY - Own of all spreadsheet templates used for major processes (i.e. Bonded upload, freight claim calculator, small package calculator, customs invoices, etc.)
5. Complete one of the following:

- ✓ Documented above and beyond performance on either a project and/or specific situation outside of the scope of normal job duties, responsibilities, and expectations
  - ✓ Implemented a new process or procedure that resulted in a documented cost savings, significant improvement in workflow, or reduction in company resources
  - ✓ Assumed a new responsibility or took on an additional project outside of the scope of normal job duties, responsibilities, and expectations
6. No documented performance or attendance issues within the previous 12 months.
  7. Receives a “meets” or “exceeds” on the previous bi-annual performance evaluation.

### SENIOR

1. Able to build queries within SAP
  2. Main point of contact and support when management is not available
  3. Implemented a new process or procedure that resulted in a documented cost savings, significant improvement in workflow, or reduction in company resources
  4. Demonstrate long term thinking by creating department goals to meet future needs
  5. Assist in QC process for new employees
  6. Assist in setting up new accounts (Retail)
  7. No documented performance or attendance issues within the previous 12 months
  8. Receives a “meets” or “exceeds” on the previous bi-annual performance evaluation
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### CORE COMPETENCIES

1. **Professionalism** - Upholds organizational values, demonstrates sound business ethics, works with integrity and ethically in all situations, and treats others with respect and consideration at all times regardless of their status or position. Accepts responsibility for actions, reacts well under pressure, follows through on commitments, and demonstrates consistency between words and actions.
2. **Project Management** – Completes appropriate amount of projects within the given timeframe.
3. **Diligence** –Perseveres in accomplishing tasks or objectives and maintains a sense of urgency about getting results.
4. **Develop Relationships** – Builds and maintains relationships that incorporate cooperation, trust, and respect by devoting the appropriate time and energy to facilitate business transactions. Relates to others while building credibility and rapport, communicates in an honest and straightforward manner, and maintains networks.
5. **Attention to Detail** – Completes work in a thorough and complete manner, provides detailed information, and tracks details at all times.
6. **Active Communications (Verbal, Written, Listening Skills)** – Clearly expresses ideas, information, and concerns both verbally and in written format in both positive and negative situations. Actively listens, offers full attention when others speak, gives verbal and nonverbal cues of interest, asks questions for clarification, and paraphrases to ensure understanding. Actively

seeks and disseminates information from and to a variety of sources, accepts responsibility for ensuring that people have the current and accurate information needed for success, and asks questions to open channels of communication. Demonstrates group presentation skills, presents information and numerical data effectively, and actively participates in meetings.

7. **Responsiveness** – Takes action to meet the needs of others, responds timely without supervision, and minimizes delays.
  8. **Productivity** - Meets or exceeds productivity standards, completes work in timely manner, and strives to increase productivity.
  9. **Problem Solving & Decision Making**— Able to identify problems, solve them, and show good judgment by isolating causes from symptoms, gathering information from a variety of sources, compiling information and solutions, involving others as appropriate, readily committing to action, and making decisions that reflect sound judgment in a timely manner. Able to identify and choose between multiple options, work well in-group problem solving situations, understand consequences of potential decisions, and support and explain reasoning for decisions.
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Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### **PHYSICAL DEMANDS**

1. Must be able to remain in a stationary position 50% of the time.
2. Must be able to bend, climb stairs, and continuously stand or walk 25% of the time.
3. Must be able to occasionally move within the office to access file cabinets, office machinery, etc.
4. Must be able to lift 10-20 pounds (for example: packages, copy paper boxes, etc.)
5. Must be able to communicate effectively by listening and also in both written and verbal forms.

#### **WORK ENVIRONMENT**

1. Generally, works in an office environment but may occasionally be required to perform job duties outside of the typical office setting.
2. This position regularly requires large amounts of time to be spent using and viewing computer screens and equipment, which generally entails regular and repetitive motions.
3. May occasionally be exposed to fumes, airborne particles, or chemicals. All safety procedures should be adhered to in each of these situations.

#### **SIGNATURES**

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This job description has been approved by all levels of management.

**Manager Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Human Resources Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

The employee signature below constitutes the employee's understanding of the requirements, essential functions and duties of the position.

**Employee Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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