



Client Service Professional

I. REPORTS TO: Client Service Leader

II. JOB SUMMARY –

The Client Service Professional is responsible for ensuring that each client receives the best possible care and attention. This is achieved by greeting/acknowledging each client, identifying his/her needs, and providing prompt and accurate information, while maintaining a pleasant and professional atmosphere.

III. ESSENTIAL DUTIES AND RESPONSIBILITIES –

- Greets and welcomes each client in a cheerful and professional manner immediately as the client enters the tax office. Quickly determines the client's service needs and assigns the client to an appropriate Associate in the scheduling program.
- Monitors client flow by managing and advising clients of the anticipated wait time and following-up when there are any expected delays.
- Remains current with other H&R Block products and services in order to provide basic product information to clients. Reads other business publications, as recommended by the District Manager's instructions. Promotes and provides information on additional tax and financial products, which the company may make available.
- Answers the telephone in a professional manner, providing callers with basic information about services and fees when requested. Transfers calls to available tax Associates as necessary to fully respond to inquiries or resolve problems.
- Receives and secures cash, cheques, debit/credit card receipts, and balances the cash as part of the mid-day or end-of-the-day closing procedures. Records all transactions in the Point-of-Sale computer and completes bank deposits in accordance with the District Manager's instructions.
- Schedules client appointments for the office staff. Assembles client folders as required, maintains confidential/sensitive files, and promptly files completed returns. Assists with the maintenance of COD pending and pick-up files.
- Maintains proper office appearance and cleanliness. Ensures that workstation is neat and clean at all times and prepares for the following day by ensuring that adequate supplies are on hand.
- Other duties as assigned.

IV. QUALIFICATIONS –

- High school diploma or equivalent.
- Two to four years of clerical/administrative experience or equivalent.
- Must have good reading and math skills in order to understand information and effectively explain information to others.
- Previous experience in a customer service environment.
- Ability to add, subtract and provide exact change when exchanging money between the company and the client.
- Ability to operate a computer and applicable software packages.
- Must be willing to work flexible hours.

THE ABOVE STATEMENTS ARE INTENDED TO DESCRIBE THE GENERAL NATURE AND LEVEL OF WORK BEING PERFORMED BY INDIVIDUALS ASSIGNED TO THIS POSITION. THEY ARE NOT INTENDED TO BE AN EXHAUSTIVE LIST OF ALL RESPONSIBILITIES, KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED OF INDIVIDUALS SO CLASSIFIED. REASONABLE ACCOMODATIONS MAY BE MADE TO ENABLE INDIVIDUALS WITH DISABILITIES TO PERFORM THE ESSENTIAL DUTIES AND RESPONSIBILITIES.