

Job Title: Customer Service Manager
Reports to: General Manager of Operations
Location: Petaluma

Position Summary:

The Customer Service Manager (CSM) is responsible for the leadership and oversight of the order management process for Exclusive Brands for both wine and spirits. The CSM will also act as the primary point of contact with the Company's Third-Party Warehouse and Fulfillment Logistics Vendor (3PL).

The CSM plays a critical role to actively engage with Operations, Financial Planning & Analysis (FP&A) and Sales, in order to ensure best practices are followed through in the execution of customer orders.

Essential Duties and Responsibilities:

Customer Service Management

- Build and maintain strong relationships with external order placing customers, which include distributors and the Company's direct-ship retailers.
- Respond and resolve distributor inquiries by working with the Company's 3PL and shipment carriers.
- Effectively communicate and interact with the Company's Sales Team to better service distributors as needed.
- Utilize software that includes Targit and Microsoft Navision (NAV) to extract data and communicate status to the Sales Team and FP&A regarding open and shipped orders.
- Collaborate with Sales Team to set up product allocations and collect FOB recommendations for each state.
- Work with FP&A to obtain approved FOB pricing.
- Review and maintain up-to-date pricing in NAV for Exclusive wine and spirits brands.
- Manage and oversee order-entry process, order status, tracking allocations per market, and distributor invoices.
- Ensure timely and accurate processing of purchase orders that includes receipt of order, FOB pricing, inventory verification, order input into NAV, uploading of orders into the Company's 3PL portal and email confirmation.
- Manage vintage transitions, to ensure timely first-in, first-out shipment of older products.
- Collaborate with Operations to ensure information regarding current and accurate inventory availability.
- Responsible for weekly reconciliation of open-orders and shipped-orders against 3PL; reconcile and resolve discrepancies as needed.
- Reconcile end-of-month with Accounting.
- Representing the Order Management process, participate in daily and monthly cross-functional Operations and Planning meetings as they relate to Demand, Supply, SMOG and Daily Operations.

- Manage timelines for replenishment of out-of-stock items with Supply Chain Team
- Act as point-of-contact regarding customer feedback communications and work with Sales and internal partners to find appropriate solutions for the customer communication.
- Maintain complete listing of product specs (bottle, case, pallet) to support Sales for new-item-process with distributors.

Third-Party Warehouse and Fulfillment Vendor (3PL)

- Liaise with the Company's 3PL to communicate pertinent information, improve processes and address issues arising during the order fulfillment process.
- Ensure frequent monitoring of the Company's 3PL portal entries to ensure real time information and action taken to process orders.
- Reconcile the Company's inventory accuracy as stated in NAV with the Company's 3PL.

Process Improvement

- Review the structure of the Customer Service Department and recommend changes to optimize operational efficiency and customer satisfaction.
- Act as point lead with cross functional teams to identify and recommend process improvements.
- Investigate and maintain customer service metrics and review with all functions within the organization, including 3PL metrics for service and accuracy.
- Map out and evaluate all aspects of the customer service process and identify clear roles and responsibilities with the organization.
- Create formal procedures for customer service activities and NAV transactions that will utilize best practices.

Qualifications

- Bachelor's degree and/or 5-7 years related experience in Business Management and/or Customer Service management.
- Advance knowledge and proficiency of Microsoft Office programs (Word, Excel, PowerPoint).
- Previous process management experience preferred.
- Previous experience with Microsoft NAV and/or other wine tracking software a plus.
- Experience and/or knowledge preferred in wine industry sales, production, and packaging.

Attributes

- Effectively and enthusiastically build relationships with customers and co-workers.
- Ability to address customers' needs and make critical decisions or take actions to solve a problem or reach a goal while following Company processes.
- Attention to detail in all aspects of Production and Sales.
- Strong organization, project management, and multi-tasking skills.
- Strong communication and leadership skills, with the ability to manage/influence people.
- Self-starter and work autonomously to see projects through to completion.

Physical Demands:

Stand	F	Lift/Carry	
Walk	O	10 lbs. or less	F
Sit	C	11 – 20 lbs.	O
Handling/Grasping (repetitive motions)	F	21 – 50 lbs.	R
Reaching Above Shoulder	R	51 – 100 lbs.	R
Reaching Outward	O	Over 100 lbs.	R
Climb	R	Push/Pull	
Crawl	R	12 lbs. or less	F
Squat or kneel	O	13 – 25 lbs.	O
Bend	O	26 – 40 lbs.	R
Working at the computer	C	41 – 100 lbs.	R
Driving	N	Near Vision (closer than arm’s length)	C
Respirator Use	N	Far Vision (farther than arm’s length)	O
Other Personal Protective Equipment Use	C	Color Vision	F

Legend:

N (Not Applicable)	Activity is not applicable to this occupation.
R (Rarely)	Occupation requires this activity several times a month (not daily)
O (Occasionally)	Occupation requires this activity up to 33% of the time (0-2.5hrs/day)
F (Frequently)	Occupation requires this activity from 33% - 66% of the time (2.5-5.5 hrs/day)
C (Constantly)	Occupation requires this activity more than 66% of the time (5.5+ hrs/day)

The above information is representative of the work performed in this position; however, it is not all-inclusive. The omission of a specific duty or responsibility does not exclude it from the position if the work is similar or related to the essential duties and responsibilities. Other tasks may be assigned as needed.

Reasonable Accommodations Statement:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.