

Order Processing Specialist Job Description



Overview

Pragmatic Institute is the leading provider in the world of product management, product marketing & data science training, partnering with some of the largest and best-known names in the tech industry. Our clients are fanatical about who we are and the impact we've had on their products, their companies, and their careers.

Job Description

The Order Processing Specialist is responsible for order management with reliable and high-quality administrative support. This position resides in the Finance department and reports to the Accounting Manager, but also works closely with the other departments including Sales and Operations. This role is responsible for enhancing the overall operating efficiency and excellence of the order management function.

Duties and Responsibilities

- Review & process sales orders following business guidelines including but not limited to new order generation, change orders, and pending orders.
- Maintain reporting within CRM system, internal order management within our LMS system, & Excel documentation such as various Order Trackers
- Serves as a liaison amongst Finance and Sales to assist with ad hoc questions & general operations support for sales team
- Process group public sales orders generated via Public Sales or Account Executives as well as any cancellation or rescheduling requests
- Prepare payment links for processing public registrations for individual and group public orders
- Audit and clean-up of previous month cancellations
- Attends and actively participates in departmental meetings and calls
- Performs other tasks as required with Finance and cross-functional partners

What will it take to succeed at this role?

- Exceptional organizational skills & a high attention to detail
- Strong verbal & written communication skills
- Preferred experience with & knowledge of CRM and LMS systems
- Experience in a high volume & task-oriented environment
- Self-driven with a positive attitude
- Customer-centric view in discussing customer internally and externally
- Professional writing and communication skills to internal and external customers
- Preferred knowledge of Microsoft Suite including Excel, Outlook as well as Salesforce.com
- Ability to adapt to fast-paced changing business needs while being able to work independently

Supervisory Responsibility

This position has no supervisory responsibilities

Work Environment

This job operates in a fully-remote professional business environment. The role routinely uses standard office equipment.

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. While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand, squat, bend and walk; use hands to finger, handle or feel; and reach with hands and arms.

POSITION TYPE/EXPECTED HOURS OF WORK

Some flexibility in hours is allowed, however the employee must be available for a minimum of eight hours during "core" business hours between 7:00 am – 6:00 pm Monday – Friday as determined by the position and discretion of the supervisor.

TRAVEL

No travel required.