

JOB DESCRIPTION GUIDELINES

for 32 Positions in Manufacturing, Wholesale and Distribution

INTRODUCTION

The job description is a summary of the most important features of a job. It details the knowledge, skill, ability, and responsibilities of the job. The job requirements and the job specifications are found there. The basic education and training requirements are listed on the job description. Effort and working conditions are valuable parts of a job description because the physical requirements may assist in evaluating candidates for compliance the The Americans With Disabilities Act. The job description assists in determining whether the job is exempt from overtime under the Fair Labor Standards Act. It is virtually impossible to manage your hiring, training, compensation, or performance management systems without a job description.

USES OF JOB DESCRIPTIONS

There are many uses of job descriptions in managing your business:

- Define the duties of the job for hiring, training, pay, and performance reviews
- Assists the Trainer in determining what skills need to be trained
- Allows for consistent understanding of the job by all managers
- Lets the employee know the requirements and duties of the job
- Allows management to establish the appropriate comparison to similar jobs in the area to set a pay rate
- Serves as a guide to managers when reviewing performance of an employee

FORMATTING THE JOB DESCRIPTION

There is no standard format to create a job description. The format varies from one company to another. It is important to use a format that will allow all elements of the job description to be included. There are resources on the Internet to assist in establishing a format that works best for your company. Most highly skilled HR professionals use a best practices approach taught in formal education courses.

ELEMENTS OF THE JOB DESCRIPTION

Keep in mind the easiest thing in the world to scrutinize is “the printed word.” The contents of the job description will be under scrutiny whenever challenged, especially by the external enforcing agencies, such as the Department of Labor. The Department of Labor has oversight and enforcing authority over employment practices of all U.S. businesses. For example, If you use the term “he” and insert an asterisk (*) that says, *“Masculine pronouns used in this job description refer to both masculine and feminine genders,”* you may be surprised when the Equal Employment Opportunity Commission says your disclaimer is a subterfuge for discrimination. Use the term “employee” instead.

Job Descriptions typically have a Job Title. The header may also contain a job grade, the exemption status, the assigned shift, and the title of the person to whom the job reports. Essential elements to include in the job description are:

- General Summary
- Essential Duties

- Other Duties
- Effort
- Mandatory Skills, Licenses, Etc.
- Working Conditions
- Minimum Educational Level Required
- Other Success Factors

DISCLAIMERS

Job descriptions should carry a disclaimer explaining the limits of the job description. It may read, *“This job description may be altered to reflect changes in duties and other duties may be assigned to the incumbent employee.”* Revisit your job descriptions yearly or more often if there is substantial change to the job.

DUTIES/TASKS FOR SELECTED JOBS

The following list identifies the essential duties/tasks of positions often found in the businesses of distributors, manufacturers, independent rep agencies, etc. To use this information, copy those duties/tasks that apply to the job description you are creating, delete the duties that do not apply, and supplement any additional duties to assure the description is complete.

ACCOUNTANT

- Prepare, examine, or analyze accounting records, financial statements, or other financial reports to assess accuracy, completeness, and conformance to reporting and procedural standards.
- Report to management regarding the finances of the business.
- Establish tables of accounts and assign entries to proper accounts.
- Develop, implement, modify, and document recordkeeping and accounting systems, making use of current technology.
- Compute taxes owed and prepare tax returns, ensuring compliance with payment, reporting, or other tax requirements.
- Advise clients in areas such as compensation, employee health care benefits, the design of accounting or data processing systems, or long-range tax or estate plans.
- Develop, maintain, and analyze budgets, preparing periodic reports that compare budgeted costs to actual costs.
- Provide internal and external auditing services for businesses or individuals.
- Analyze business operations, trends, costs, revenues, financial commitments and obligations, to project future revenues and expenses or to provide advice.
- Add credit card and direct deposit transactions.

ADMINISTRATIVE ASSISTANT/SECRETARY

- Prepare invoices, reports, memos, letters, financial statements, and other documents, using word processing, spreadsheet, database, or presentation software.
- Answer phone calls and direct calls to appropriate parties or take messages.
- Conduct research, compile data, and prepare papers for consideration and presentation by executives, committees, and boards of directors.
- Attend meetings to record minutes.

- Greet visitors and determine whether to grant access to specific individuals.
- Read and analyze incoming memos, submissions, and reports to determine their significance and plan their distribution.
- Perform general office duties, such as ordering supplies, maintaining records management database systems, and performing basic bookkeeping work.
- File and retrieve corporate documents, records, and reports.
- Open, sort, and distribute incoming correspondence, including faxes and e-mail.
- Make travel arrangements for executives.
- May supervise the Receptionist, janitor or other office clerk.

ACCOUNTING CLERKS – BOOKKEEPERS, A/P, AND A/R CLERKS

- Operate computers programmed with accounting software to record, store, and analyze information.
- Check figures, postings, and documents for correct entry, mathematical accuracy, and proper codes.
- Classify, record, and summarize numerical and financial data to compile and keep financial records, using journals and ledgers or computers.
- Debit, credit, and total accounts on computer spreadsheets and databases, using specialized accounting software.
- Operate calculators to perform calculations and produce documents.
- Receive, record, and bank cash, checks, and other financial transactions.
- Comply with federal, state, and company policies, procedures, and regulations.
- Compile statistical, financial, accounting or auditing reports and tables pertaining to such matters as cash receipts, expenditures, accounts payable and receivable, and profits and losses.
- Code documents according to company procedures.
- Reconcile or note and report discrepancies found in records.

BRANCH MANAGER

- Establish and maintain relationships with individual and business customers and provide assistance with problems they may encounter.
- Examine, evaluate, and process orders.
- Assure inventory levels are always in balance.
- Plan, direct, and coordinate the activities of workers in branches.
- Oversee the flow of cash and financial instruments.
- Recruit staff members and oversee training programs.
- Network within communities to find and attract new customers.
- Resolve conflicts with customers that cannot be resolved by others.
- Approve, reject, or coordinate the approval or rejection payment methods.
- Prepare financial and regulatory reports required by laws, regulations, and management.
- Establish procedures for custody and security of assets, including the physical property, inventory, and employees.

- May review collection reports to determine the status of collections and the amounts of outstanding balances.
- Ensure safe, healthy, and non-discriminatory work environment that meets Federal, State, and Local requirements.
- Responsible for overall store appearance to assure the place of business is attractive.
- Oversee profit performance.
- Enforce company policies and procedures.
- Responsible for all aspects of safety, including safety meetings, policy enforcement, employee training.
- Responsible for store maintenance, both scheduled and unscheduled.

BUYER

- Use computers to organize and locate inventory, and operate spreadsheet and word processing software.
- Negotiate prices, discount terms, and transportation arrangements for merchandise.
- Manage the department for which they buy.
- Confer with sales and purchasing staff to obtain information about customer needs and preferences.
- Examine, select, order, and purchase at the most favorable price merchandise consistent with quality, quantity, specification requirements, and other factors.
- Analyze and monitor sales records, trends, and economic conditions to anticipate consumer buying patterns and determine what the company will sell and how much inventory is needed.
- Set or recommend mark-up rates, mark-down rates, and selling prices for merchandise.
- Authorize payment of invoices or return of merchandise.
- Interview and work closely with vendors to obtain and develop desired products.
- Conduct staff meetings with sales staff to introduce new merchandise.
- Update item information in the computer system as changes occur, including descriptions, packaging, pricing, etc.
- Identify and bring to management's attention any obsolete, discontinued, or slow moving inventory. Make vendor returns where possible.
- Manage inventory levels.
- Perform category reviews to determine optimum product selection.

CONTROLLER/ TREASURER

- Prepare and file annual tax returns or prepare financial information so outside accountants can complete tax returns.
- Prepare or direct preparation of financial statements, business activity reports, financial position forecasts, annual budgets, or reports required by regulatory agencies.
- Supervise employees performing financial reporting, accounting, billing, collections, payroll, and budgeting duties.

- Delegate authority for the receipt, disbursement, banking, protection, and custody of funds, securities, and financial instruments.
- Maintain current knowledge of organizational policies and procedures, federal and state policies and directives, and current accounting standards.
- Conduct or coordinate audits of company accounts and financial transactions to ensure compliance with state and federal requirements and statutes.
- Receive, record, and authorize requests for disbursements in accordance with company policies and procedures.
- Monitor financial activities and details such as reserve levels to ensure all legal and regulatory requirements are met.
- Monitor and evaluate the performance of accounting and other financial staff, recommending and implementing personnel actions, such as promotions and dismissals.
- Develop and maintain relationships with banking, insurance, and non-organizational accounting staff to facilitate financial activities.

INSIDE SALESPERSON

- Sell and service customers, providing pricing and product application information.
 - Inside Sales Generation Priority #1 by taking phone/fax orders, provide delivery information.
 - Quote preparation and follow up as required in a timely manner.
 - Service Outside Sales staff as required – provide timely feedback and “heads up” on large to quotes.
 - Input all orders into sales order entry system in a timely manner.
 - Schedule orders according to customer requirements.
 - Communicate honestly and succinctly with purchasing department.
 - Perform day-to-day customer relations and service duties.
 - Stay current on product knowledge.
 - Know the company catalog inside and out.
 - As needed vendor relations and negotiations.
 - Maintain computer and software-related skills.
 - Attends department and company meetings, as requested.
 - Assist with counter sales as needed.
 - Provide promotional literature and product information as requested.
 - Keep supervisors apprised of customer issues as warranted.
 - Assist with inventory management program when required.
 - Perform duties inherent to all inside sales staff.
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- Make phone sales calls; and create and maintain customer lists.
 - Suggest related “add on” items for customer orders.
 - Communicate with outside sales and management regarding job starts and sites.
 - Communicate with customers regarding new products added or customer feedback on potential new products.

- Assist other inside sales staff when needed.

CREDIT/ COLLECTION MANAGER

- Analyze credit data and financial statements to determine the degree of risk involved in extending credit or lending money.
- Generate financial ratios, using computer programs, to evaluate customers' financial status.
- Consult with customers to resolve complaints and verify financial and credit transactions.
- Prepare reports that include the degree of risk involved in extending credit or lending money.
- Compare liquidity, profitability, and credit histories of establishments being evaluated with those of similar establishments in the same industries and geographic locations.
- Review individual or commercial customer files to identify and select delinquent accounts for collection.
- Confer with credit association and other business representatives to exchange credit information.
- Complete loan applications, including credit analyses and summaries of loan requests, and submit to loan committees for approval.
- Analyze financial data such as income growth, quality of management, and market share to determine expected profitability of loans.
- Evaluate customer records and recommend payment plans based on earnings, savings data, payment history, and purchase activity.
- Approve special terms for larger orders.
- Establish and monitor a "high credit limit" system.

CUSTOMER SERVICE MANAGER

- Develop and implement procedures pertinent to the effective and efficient operation of the Customer Service Department.
- Supervise the staff, including selection, training, performance reviews, coaching, and disciplinary matters.
- Maintain in-depth working knowledge of products and warranties.
- Assure that customer problem solving is always done in a professional and effective manner by regular silent monitoring of call center work.
- Set performance standards to meet services goals of the company.
- Measure Customer Service Representative performance regularly and address issues as they occur.
- Gather information and research and provide regular feedback to management regarding product failures.
- Prepare department budget and review timesheets.
- Create general and review weekly telephone reports.
- Evaluate the department staffing demands, based on customer needs.
- Distribute work based on skills and availability of time.

- Update and implement the *Customer Service Training Manual* as needed.
- Create a variety of short warranty-related correspondence.
- Generate sales and credit invoices as needed.
- Work with employees in sales and shipping employees on issues related to customer issues and delays.
- Supervise the filing of invoices shipped.
- Generate and review weekly/bi-weekly reports from the supervisor.
- Serve as a resource (subject matter expert) to other departments regarding warranty-related questions and problems.

INFORMATION SYSTEMS MANAGER

- Lead the IT department's operational and strategic planning, including fostering innovation, planning projects, organizing, and negotiating the allocation of resources.
- Manage the deployment, monitoring, maintenance, development, upgrade, and support of all IT systems, including telecommunications, servers, PCs, operating systems, hardware, software, peripherals, and office automation equipment.
- Benchmark, analyze, report on, and make recommendations for the improvement and growth of the IT infrastructure and IT systems.
- Oversee provision of end-user services, including help desk and technical support services.
- Work with stakeholders to define business and systems requirements for new technology implementations.
- Keep current with the latest technologies.
- Manage financial aspects of the IT department, including recommending purchasing of hardware and programs, budgeting, and budget review.
- Develop business case justifications and cost/benefit analyses for IT spending and initiatives.
- Approve and oversee projects and project portfolio.
- Develop and implement all IT policies and procedures, including those for architecture, security, disaster recovery, standards, purchasing, and service provision.
- Develop requests for proposal.
- Negotiate and administer vendor, outsourcer, and consultant contracts and service agreements.
- Practice asset management for IT hardware, software, and equipment.
- Manage IT staffing, including recruitment, supervision, scheduling, development, evaluation, and disciplinary actions.
- Establish and maintain regular written and in-person communications with the organization's executives, department heads, and end users regarding pertinent IT activities.
- Create, manage, upgrade, and maintain the web site and telecommunications equipment.

DISPATCHER

- Schedule and dispatch workers, crews, equipment, or service vehicles to appropriate locations according to customer requests, specifications, or needs, using radios or telephones.
- Confer with customers or supervising employees to address questions, problems, and requests for service or equipment.
- Monitor staff or equipment locations and utilization to coordinate service and schedules.
- Receive or prepare work orders.
- Relay work orders, messages, and information to or from work crews, supervisors, and field inspectors using telephones or two-way radios.
- Record and maintain files and records of customer requests, work or services performed, charges, expenses, inventory, and other dispatch information.
- Prepare daily work and run schedules.
- Determine types or amounts of equipment, vehicles, materials, or staff required according to work orders or specifications.
- Advise employees about traffic problems such as construction areas, accidents, congestion, weather conditions, and other hazards.
- Arrange for necessary repairs to restore service and schedules.

DELIVERY PERSON OR DRIVER

- Obey traffic laws and follow established traffic and transportation procedures.
- Inspect and maintain vehicle supplies and equipment, such as gas, oil, water, tires, lights, and brakes to ensure that vehicles are in proper working condition.
- Report any mechanical problems encountered with vehicles.
- Present bills and receipts and collect payments for goods delivered or loaded.
- Load and unload trucks, vans, or automobiles.
- Verify the contents of inventory loads against shipping papers.
- Turn in receipts and money received from deliveries.
- Maintain records such as vehicle logs, records of cargo, or billing statements in accordance with regulations.
- Read maps, and follow written and verbal geographic directions.
- Report delays, accidents, or other traffic and transportation situations to bases or other vehicles, using telephones or mobile two-way radios.
- Report any problems that occur with customer if possible before leaving delivery location.

GENERAL MANAGER

- Oversee activities directly related to the success of the business.
- Direct and coordinate activities of branches or departments concerned with the pricing, sales or distribution of products. This may include production when manufacturing is part of the business.

- Review financial statements, sales and activity reports, and other performance data to measure productivity and goal achievement and to determine areas needing cost reduction and program improvement.
- Manage staff, prepare work schedules, and assign specific duties.
- Direct and coordinate organization's financial and budget activities to fund operations, maximize investments, and increase efficiency.
- Establish and implement departmental policies, goals, objectives and procedures, conferring with board members, organization officials, and staff members as necessary.
- Determine staffing requirements, and interview, hire, and train new employees, or oversee those personnel processes.
- Plan and direct activities such as sales promotions, coordinating with other department heads as required.
- Recommend goods and services to be sold, and set prices and credit terms, based on forecasts of customer demand.
- Locate, select, and procure merchandise for resale, representing management in purchase negotiations.

HUMAN RESOURCES COORDINATOR

- Process, verify and maintain employee-related documentation, including staffing, recruitment, training, complaints, pay, performance evaluations, classifications, and employee leaves of absence.
- Explain company personnel policies, benefits, and procedures to employees or job applicants.
- Record data for each employee, including such information as addresses, weekly earnings, absences, amount of sales or production, supervisory reports on performance, and dates of and reasons for terminations, manually or into a computerized system.
- Gather personnel records from other departments or employees.
- Examine employee files to answer inquiries and provide information for personnel actions.
- Answer questions regarding examinations, eligibility, salaries, benefits, and other pertinent information.
- Compile and prepare reports and documents pertaining to staff activities.
- Request information from law enforcement officials, previous employers, and other references to determine applicants' employment acceptability.
- Process and review employment applications to evaluate qualifications or eligibility of applicants.
- Arrange for advertising or posting of job vacancies, and notify eligible workers of position availability.

SUPPLY CHAIN MANAGER

- Design and implement supply chains that support business strategies adapted to changing market conditions, new business opportunities, or cost reduction strategies.
- Develop procedures for coordination of supply chain management with other functional areas, such as sales, marketing, finance, production, and quality assurance.
- Manage activities related to strategic or tactical purchasing, material requirements planning, inventory control, warehousing, or receiving.

- Participate in the coordination of engineering changes, product line extensions or new product launches to ensure orderly and timely transitions in material and production flow.
- Analyze information about supplier performance and procurement program success.
- Analyze inventories to determine how to increase inventory turns, reduce waste, or optimize customer service.
- Confer with supply chain planners to forecast demand or create supply plans that ensure availability of materials and products.
- Define performance metrics for measurement, comparison, or evaluation of supply chain factors such as product cost and quality.
- Design and implement plant warehousing strategies for production materials or finished products when manufacturing is part of the business
- Develop and implement procedures or systems to evaluate and select suppliers.

MARKETING MANAGER

- Formulate, direct, and coordinate marketing activities and policies to promote products and services, working with advertising and promotion managers.
- Identify, develop, and evaluate marketing strategy, based on knowledge of establishment objectives, market characteristics, and cost and markup factors.
- Direct the hiring, training, and performance evaluations of marketing and sales staff and oversee their daily activities.
- Evaluate the financial aspects of product development, such as budgets, expenditures, research and development appropriations, and return-on-investment and profit-loss projections.
- Develop pricing strategies, balancing firm objectives, and customer satisfaction.
- Compile lists describing product or service offerings.
- Initiate market research studies and analyze their findings.
- Use sales forecasting and strategic planning to ensure the sale and profitability of products, lines or services, analyzing business developments, and monitoring market trends.
- Coordinate and participate in promotional activities and trade shows, working with developers, advertisers and production managers, to market products and services.
- Consult with buying staff to gain advice regarding the types of products or services expected to be in demand.

MERCHANDISE MANAGER

- Take photographs of displays and signage.
- Plan commercial displays to entice and appeal to customers.
- Place prices and descriptive signs on backdrops, fixtures, merchandise, or floor.
- Change or rotate window displays, interior display areas, and signage to reflect changes in inventory or promotion.
- Obtain plans from display designers or display managers, and discuss their implementation with clients or supervisors.
- Develop ideas or plans for merchandise displays or window decorations.

- Consult with advertising and sales staff to determine type of merchandise to be featured and time and place for each display.
- Merchandizes according to a schematic.
- Construct or assemble displays and display components from fabric, glass, paper, and plastic, using hand tools and woodworking power tools, according to specifications.
- Collaborate with others to obtain products and other display items.

OFFICE MANAGER

- Resolve customer complaints and answer customers' questions regarding policies and procedures.
- Supervise the work of office, administrative, or customer service employees to ensure adherence to quality standards, deadlines, and proper procedures, correcting errors or problems.
- Provide employees with guidance in handling difficult or complex problems and in resolving escalated complaints or disputes.
- Implement corporate and departmental policies, procedures, and service standards in conjunction with management.
- Discuss job performance problems with employees to identify causes and issues and to work on resolving problems.
- Train and instruct employees in job duties and company policies or arrange for training to be provided.
- Evaluate employees' job performance and conformance to regulations and recommend appropriate personnel action.
- Review records and reports pertaining to activities such as production, payroll, and shipping to verify details, monitor work activities, and evaluate performance.
- Recruit, interview, and select employees.
- Interpret and communicate work procedures and company policies to staff.

OPERATIONS MANAGER

- Supervises the activities directly related to preparing products to be sold, distributing products, or providing services.
- Direct and coordinate activities of businesses or departments concerned with the production, pricing, sales, or distribution of products.
- Review financial statements, sales and activity reports, and other performance data to measure productivity and goal achievement and to determine areas needing cost reduction and program improvement.
- Manage staff, preparing work schedules, and assigning specific duties.
- Direct and coordinate organization's financial and budget activities to fund operations, maximize investments, and increase efficiency.
- Establish and implement departmental policies, goals, objectives and procedures, conferring with board members, organization officials, and staff members as necessary.
- Determine staffing requirements, and interview, hire, and train new employees, or oversee those staff processes.

- Plan and direct activities such as sales promotions, coordinating with other department heads as required.
- Determine goods and services to be sold, and set prices and credit terms, based on forecasts of customer demand.
- Locate, select, and procure merchandise for resale, representing management in purchase negotiations.
- May be responsible for tradeshow management – acquiring and assembling samples, shipping trade show set-up equipment and materials, and actively working the show.

OUTSIDE SALESPERSON – NON-TECHNICAL

- Answer customers' questions about products, prices, availability, product uses, and credit terms.
- Recommend products to customers, based on customers' needs and interests.
- Contact regular and prospective customers to demonstrate products, explain product features, and solicit orders.
- Estimate or quote prices, credit or contract terms, warranties, and delivery dates.
- Consult with clients after sales or contract signings to resolve problems and to provide ongoing support.
- Prepare drawings, estimates, and bids that meet specific customer needs.
- Provide customers with product samples and catalogs.
- Identify prospective customers by using business directories, following leads from existing clients, participating in organizations and clubs, and attending trade shows and conferences.
- Arrange and direct delivery and installation of products and equipment.
- Monitor market conditions, product innovations, and competitors' products, prices, and sales.
- Create invoices and collect payments.
- May be required to follow-up on past due accounts.

OUTSIDE SALESPERSON – TECHNICAL

- Contact new and existing customers to discuss their needs, and to explain how these needs could be met by specific products and services.
- Answer customers' questions about products, prices, availability, product uses, and credit terms.
- Quote prices, credit terms, and other bid specifications.
- Emphasize product features based on analyses of customers' needs, and on technical knowledge of product capabilities and limitations.
- Negotiate prices and terms of sales and service agreements.
- Maintain customer records, using automated systems.
- Identify prospective customers by using business directories, following leads from existing clients, participating in organizations and clubs, and attending trade shows and conferences.
- Prepare sales contracts for orders obtained, and submit orders for processing.
- Select the correct products or assist customers in making product selections, based on customers' needs, product specifications, and applicable regulations.

- Collaborate with colleagues to exchange information such as selling strategies and marketing information.

PURCHASING MANAGER

- Represent companies in negotiating contracts and formulating policies with suppliers.
- Direct and coordinate activities of staff engaged in buying, selling, and distributing materials, equipment, machinery, and supplies.
- Interview and hire staff, and oversee staff training.
- Locate vendors of materials, equipment, or supplies, and interview them to determine product availability and terms of sales.
- Prepare and process requisitions and purchase orders for supplies and equipment.
- Develop and implement purchasing and contract management instructions, policies, and procedures.
- Maintain records of goods ordered and received.
- Participate in the development of specifications for equipment, products, or substitute materials.
- Analyze market and delivery systems to assess present and future material availability.
- Resolve vendor or contractor grievances, and claims against suppliers.
- Maintain inventory turn ratio set by corporate officers.
- Move and price excess and obsolete inventory for maximum ROI.

PRESIDENT – CHIEF EXECUTIVE

- Direct and coordinate an organization's financial and budget activities to fund operations, maximize investments, and increase efficiency.
- Confer with board members, organization officials and staff members to discuss issues, coordinate activities, and resolve problems.
- Analyze operations to evaluate performance of a company and its staff in meeting objectives, and to determine areas of potential cost reduction, program improvement, or policy change.
- Direct, plan, and implement policies, objectives, and activities of organizations or businesses to ensure continuing operations, to maximize returns on investments, and to increase productivity.
- Prepare budgets for approval, including those for funding and implementation of programs.
- Direct and coordinate activities of businesses or departments concerned with production, pricing, sales, or distribution of products.
- Negotiate or approve contracts and agreements with suppliers, distributors, federal and state agencies, and other organizational entities.
- Review reports submitted by staff members to recommend approval or to suggest changes.
- Appoint department heads or managers and assign or delegate responsibilities to them.
- Direct human resources activities, including the approval of human resource plans and activities, the selection of directors and other high-level staff, and establishment and organization of major departments.

RECEIVING/SHIPPING CLERK

- Examine contents and compare with records, such as manifests, invoices or orders, to verify accuracy of incoming or outgoing shipment.
- Prepare documents, such as work orders, bills of lading, and shipping orders to route materials.
- Record shipment data, such as weight, charges, space availability, and damages and discrepancies, for reporting, accounting, and recordkeeping purposes.
- Determine shipping method for materials, using knowledge of shipping procedures, routes, and rates.
- Deliver or route materials to departments, using work devices, such as forklift, hand truck, conveyor, or sorting bins.
- Pack, seal, label, and affix postage to prepare materials for shipping, using work devices such as hand tools, power tools, and postage meter.
- Confer and correspond with establishment representatives to rectify problems, such as damages, shortages, and nonconformance to specifications.
- Requisition and store shipping materials and supplies to maintain inventory of stock.
- Contact carrier representative to make arrangements and to issue instructions for shipping and delivery of materials.
- Compute amounts, such as space available and shipping, storage and demurrage charges, using calculator or price list.

RECEPTIONIST

- Operate telephone system to answer, screen, and forward calls, providing information, taking messages, and scheduling appointments.
- Sort and deliver mail.
- Receive payment and record receipts for services.
- Perform administrative support tasks such as proofreading, transcribing handwritten information, and operating calculators or computers to perform clerical work.
- Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.
- Hear and resolve complaints from customers and public.
- File and maintain records.
- Transmit information or documents to customers, using computer, mail, or fax machine.
- Schedule appointments, and maintain and update appointment calendars.
- Analyze data to determine answers to questions from customers or members of the public.
- Provide information about establishment such as location of departments or offices, employees within the organization, or services provided.

COUNTER/RENTAL CLERK

- Compute charges for merchandise or services and receive payments.
- Prepare merchandise for display, or for purchase or rental.
- Recommend and provide advice on a wide variety of products and services.
- Answer telephones to provide information and receive orders.

- Greet customers and discuss the type, quality, and quantity of merchandise sought for rental.
- Keep records of transactions and of the number of customers entering the business
- Prepare rental forms, obtaining customer signature and other information, such as required licenses.
- Receive, examine and tag articles to be altered, cleaned, stored, or repaired.
- Inspect and adjust rental items to meet needs of customer.
- Explain rental fees, policies, and procedures.
- Learn basics of proper merchandising.
- Must strive to improve product knowledge.

REPAIR/SERVICE TECHNICIAN

- Repair or replace defective equipment parts, using hand tools and power tools, and reassemble equipment.
- Perform routine preventive maintenance to ensure that machines continue to run smoothly, building systems operate efficiently or the physical condition of buildings does not deteriorate.
- Inspect drives, motors and belts, check fluid levels, replace filters, or perform other maintenance actions, following checklists.
- Use tools ranging from common hand and power tools, such as hammers, hoists, saws, drills, and wrenches, to precision measuring instruments and electrical and electronic testing devices.
- Assemble, install, or repair wiring, electrical and electronic components, pipe systems and plumbing, machinery, and equipment.
- Diagnose mechanical problems and determine how to correct them, checking blueprints, repair manuals, and parts catalogs as necessary.
- Inspect, operate, and test machinery and equipment to diagnose machine malfunctions.
- Record type and cost of maintenance or repair work.
- Clean and lubricate shafts, bearings, gears, and other parts of machinery.
- Dismantle devices to access and remove defective parts, using hoists, cranes, hand tools, and power tools.

SALES MANAGER

- Resolve customer complaints regarding sales and service.
- Oversee regional and local sales managers and their staffs.
- Plan and direct staffing, training, and performance evaluations to develop and control sales and service programs.
- Determine price schedules and discount rates.
- Review operational records and reports to project sales and determine profitability.
- Monitor customer preferences to determine focus of sales efforts.
- Prepare budgets and approve budget expenditures.
- Confer or consult with department heads to plan advertising services and to secure information on equipment and customer specifications.

- Direct and coordinate activities involving sales of manufactured products, services, commodities, real estate, or other subjects of sale.
- Confer with potential customers regarding equipment needs and advise customers on types of equipment to purchase.
- Attend industry meetings and participate in trade shows.

EQUIPMENT/TOOL REPAIR

- Measure velocity, horsepower, revolutions per minute (rpm), amperage, circuitry, and voltage of units or parts to diagnose problems, using ammeters, voltmeters, wattmeters, and other testing devices.
- Record repairs required, parts used, and labor time.
- Reassemble repaired electric motors to specified requirements and ratings, using hand tools and electrical meters.
- Maintain stocks of parts.
- Repair and rebuild defective mechanical parts in electric motors, generators, and related equipment, using hand tools and power tools.
- Rewire electrical systems, and repair or replace electrical accessories.
- Inspect electrical connections, wiring, relays, charging resistance boxes, and storage batteries, following wiring diagrams.
- Read service guides to find information needed to perform repairs.
- Inspect and test equipment in order to locate damage or worn parts and diagnose malfunctions, or read work orders or schematic drawings to determine required repairs.
- Solder, wrap, and coat wires to ensure proper insulation.

WAREHOUSE/DISTRIBUTION MANAGER

- Prepare and manage departmental budgets.
- Supervise the activities of workers engaged in receiving, storing, testing, and shipping products or materials.
- Interview, select, and train warehouse and supervisory personnel.
- Plan, develop, and implement warehouse safety and security programs and activities.
- Prepare or direct preparation of correspondence, reports, and operations, maintenance, and safety manuals.
- Issue shipping instructions and provide routing information to ensure that delivery times and locations are coordinated.
- Confer with department heads to coordinate warehouse activities, such as production, sales, records control, and purchasing.
- Review invoices, work orders, consumption reports, and demand forecasts to estimate peak delivery periods and to issue work assignments.
- Inspect physical conditions of warehouses, vehicle fleets and equipment, and order testing, maintenance, repair, or replacement as necessary.
- Schedule and monitor air or surface pickup, delivery, or distribution of products or materials.

WAREHOUSE CLERK

- Receive and count stock items, and record data manually or using computer.
- Pack and unpack items to be stocked on shelves in stockrooms, warehouses, or storage yards.
- Verify inventory computations by comparing them to physical counts of stock, and investigate discrepancies or adjust errors.
- Pick and pack orders.
- Operate materials handling equipment with proper training
- Store items in an orderly and accessible manner in warehouses, tool rooms, supply rooms, or other areas.
- Mark stock items using identification tags, stamps, electric marking tools, or other labeling equipment.
- Clean and maintain supplies, tools, equipment, and storage areas in order to ensure compliance with safety regulations.
- Determine proper storage methods, identification, and stock location based on turnover, environmental factors, and physical capabilities of facilities.
- Keep records on the use and/or damage of stock or stock handling equipment.
- Examine and inspect stock items for wear or defects, reporting any damage to supervisors.
- Provide assistance or direction to other stockroom, warehouse, or storage yard workers.

WAREHOUSE/DISTRIBUTION SUPERVISOR

- Maintain a personnel structure and staffing level to accomplish the Warehouse and Receiving mission in an effective and efficient manner.
- Interview and recommend applicants for hire as Warehouse and Receiving Associates.
- Plan and coordinate work, train and motivate, monitor and evaluate performance of Warehouse and Receiving Associates; ensure their ability to operate safely material handling equipment to move materials to and from storage configurations; Counsel, record, and discipline as necessary.
- Develop Crew Leaders to oversee the daily routines of their assigned Crew Members.
- Maintain an equipment structure and level to accomplish the Warehouse and Receiving mission in a safe, effective manner.
- Provide appropriate equipment and racking to ensure the safe transport and storage of all materials.
- Research material handling equipment to ensure procurement of the most suitable equipment in terms of performance, safety, reliability, and cost.
- Monitor the unloading of all materials into the Receiving Department; Ensure materials are staged for counting and inspection.
- Ensure receiving reports accurately report material received.
- Resolve discrepancies with Accounting regarding invoices, packing slips and receiver reports.

- Monitor the flow of paperwork from Receiving to Inventory Control for timely data entry. Oversee the movement of material from Receiving to the Warehouse in an efficient, effective, and safe manner.
- Oversee the supplying of materials to Fabrication and stages material for assembly and sub-assembly.
- Ensure materials are stored properly to conserve space and comply with safety procedures. Oversee the rotation of inventories within the warehouse.
- Monitor and measure Receiving and Warehouse performance for accuracy of locator, receiving reporting, movement, and storage of material, and transfers to Service Parts.
- Develop and recommend annual budget requirements for the Warehouse and Receiving Department.
- Anticipate and request funding for future personnel requirements.
- Anticipate and request funding for future material handling equipment.

QUALIFICATIONS

Exercise care when listing the qualifications you believe are mandatory. Only those requirements that are mandatory may be described as “required”. Others may be listed as “preferred.” Why? The Equal Employment Opportunity Commission has warned employers that we may not impose artificial barriers and obstacles to employment, such as demanding a college degree when only a high school education is required. It is impossible to defend the requirement for a college degree if you have employees performing the work satisfactorily with only a high school diploma. You may be challenged as placing an artificial requirement on the job because you know that fewer minorities have a degree than non-minorities and this requirement is a way to exclude minorities.

With this disclaimer in mind, there are certain qualifications you may want to list:

- Sufficient education to read, write, speak and understand English
- Must have basic math skills
- Must be able to perform or learn the requirements of the job in the assigned learning period.
- Must be able to meet the mobility requirements of the job, which may be to walk, stand, reach, stoop, bend, finger and/or climb
- Must be able to lift up to XX lbs. (list maximum required weight)
- Must have valid license in state of residence if driving a licensed vehicle is part of the work
- Must be able to work the assigned shift
- Must be willing to work overtime when requested
- Must be at least 18 years old to work with any age-restricted equipment, such as a forklift.
- Required to accept and follow all safety rules and policies, including the use of all mandated safety protective equipment
- Must agree to take any required drug alcohol testing, unless prohibited by law
- Required to accept all company policies and procedures

FINISHING YOUR JOB DESCRIPTION

1. Does the title describe the job?
2. Have you listed whether the job is exempt or nonexempt?
3. Have you edited out any unnecessary words?
4. Did you avoid writing an exhaustive list of duties?
5. Have you included all of the essential duties?
6. Can you defend the minimum qualifications you have listed?
7. Did you have the job description reviewed by those who know the job best?
8. Did you include the disclaimer, “Other duties may be assigned?”
9. Have you avoided using gender specific terms, such as “salesman” or “cleaning lady?”

These Job Description Guidelines, along with a list of essential duties for select positions was prepared by Human Resources Consultant Nancye Combs. Nancye has more than 35 years of practical experience in human resources and organizational development and has written more than 1,000 job descriptions. A recognized authority, she speaks, writes, serves as an expert witness, and consults worldwide on critical management issues.

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Here is an example of how you can use these essential functions to create a job description for your employee.

Your Company Name Here
POSITION DESCRIPTION

JOB TITLE:	Materials Handler	LOCATION:	Operations
FLSA STATUS:	Non-Exempt	EEO CODE:	08
REPORTS TO:	Assembly Manager	GRADE:	09

GENERAL SUMMARY:

Operate material handling equipment to move materials and supplies into and out of storage and assembly areas. Move finished goods to staging area.

ESSENTIAL DUTIES AND TASKS:

1. Move freight, stock, or other materials to and from storage or production areas, loading docks, delivery vehicles, ships, or containers, by hand or using trucks, tractors, or other equipment.
2. Sort cargo before loading and unloading.
3. Attach identifying tags to containers or mark them with identifying information.
4. Read work orders or receive oral instructions to determine work assignments or material or equipment needs.
5. Stack cargo in locations such as transit sheds or in holds of ships as directed, using pallets or cargo boards.
6. Record numbers of units handled or moved, using daily production sheets or work tickets.
7. Install protective devices, such as bracing, padding, or strapping, to prevent shifting or damage to items being transported.
8. Direct spouts and position receptacles, such as bins, carts, or containers so they can be loaded.
9. Attach slings, hooks, or other devices to lift cargo and guide loads.
10. Maintain equipment storage areas to ensure that inventory is protected.
11. Perform other duties as assigned.

WORKING CONDITIONS:

Work is performed in a distribution center. The work environment can be distracting due to noise and moving equipment in operation. The work place is noisy and dusty. Workplace is subject to climate changes.

EFFORT:

Must be able to see, walk, hear, and speak. Work is performed while operating material handling equipment for which proper training has been completed. Lifting, bending stooping and stretching is part of the work. May need to lift up to 75 pounds.

MACHINES, TOOLS, EQUIPMENT:

Saws, pressurized staplers, glue guns, forklift, pallet jack, and other equipment usually found in a production environment.

MINIMUM QUALIFICATIONS:

High School graduate or equivalent. A combination of education, training, and experience may be substituted when competency in the role is demonstrated. Successful performance on pre-employment tests is required.

Reasonable accommodations may be made to those who are able to perform the essential duties of the job. The incumbent must be able to pass any required drug test and new hire physical examination. The incumbent must be able to maintain complete confidentiality of any information s/he encounters.

SPECIALIZED SKILLS AND KNOWLEDGE:

Must be able to read, write, understand, and speak English. Must be attentive to detail and have excellent physical endurance.

- **The company reserves the right to revise and alter this job description as needed.**

Approved:

Employee Statement:

I have read this job description and a copy has been provided to me. My signature below certifies that I am able to perform the essential functions of this position.

Employee Signature: _____ Date: _____