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# JOB DESCRIPTION

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**Job Title:** New Business Intake Receptionist

**Managed by:** Amanda Kuiper

**Branch Location:** Walnut Creek, California

## Responsibilities Include

- Providing general administrative and clerical support to entire division
- Answering phones, discerning the caller's needs, detailing new client notes, and transferring calls to the appropriate staff member
- Communicating with callers in a professional, friendly, and efficient manner
- Monitoring visitor access and maintaining security awareness
- Welcoming and directing visitors

## Requirements

- Ability to speak and write professionally with excellent grammar, spelling, and punctuation
- Effective organizational, interpersonal, and communication skills required to solve routine problems, answer general questions, and ability to determine when to escalate more complex issues
- Present a polished, professional appearance and demeanor
- Ability to apply basic administrative skills to perform standardized duties
- Knowledge of administrative procedures and software applications (such as Microsoft Office)
- Ability to multitask and work in a fast-paced environment
- Highly organized hard worker with initiative, drive, and a fantastic attitude is required
- Candidates who are fluent in Spanish are strongly encouraged to apply

## Education

- High School Diploma

## Required Experience

- At least 2 years of experience in a high-volume receptionist or call center role with a strong emphasis on customer service

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Signature

Date