



Job Description

Customer Experience Representative Level 2

Job Title: Customer Experience Representative (CXR) Level 2

Department: Sales

Reports To: CXR Manager

FLSA Status: Exempt

Summary

The CXR position will manage customer relationships, support post sales needs, expand the current client relationships. The ideal candidate will be customer service focused while helping DSI deepen client relationships. The Customer Experience Representative ensures success after the installation through training and ongoing account reviews and referral development. The customer experience representative collaborates with DSI's field reps and CXR department to bring high level expertise to the solution and overall experience.

Essential Duties and Responsibilities *include the following. Other duties may be assigned.*

- Confer with customers after installation for P.E.P talk
- Prepare and deliver Partner Business Reviews for Tier 2 and Tier 3 accounts.
- Identify and log referral opportunities during QBRs and PEPTALKs. Booking referral appointments for senior sales reps
- Identify business opportunities that leverage the company's successes and maximize cross-selling opportunities through referrals
- Implement and manage account services, customer service and performance management.
- Establish and maintain internal and external professional relationships that meet our core values.
- Expand products and services within current customer accounts
- Plans work in advance: daily, weekly, and monthly.
- Participate in sales meetings & one on one meeting with manager
- Recommend ways to improve customer service and sales support
- Keep records of customer interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken.
- Check to ensure that appropriate changes are made to resolve customers' problems.
- Contact customers to respond to inquiries or to notify them of claim investigation results or any planned adjustments.
- Refer unresolved customer grievances to designated departments for further investigation.

Requirements & Qualifications

Qualifications *To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Education/Experience:

Bachelor's degree or two to four years related experience and/or training; or equivalent combination of education and experience.

Language Ability:

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

Skills and Competencies:

- Strong verbal and written communication skills
- Strong phone and interpersonal communication skills
- Ability to follow structured outreach cadences and sales scripts
- Relationship-building and active listening skills
- Organized and detail-oriented with consistent follow-up habits
- Basic discovery and qualification skills for sales handoff
- High-energy, positive, and self-motivated attitude

Work Environment

The work environment characteristics described here are representative of those an intern may encounter while performing the essential functions of this role. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Office setting.
- The noise level is usually moderate.

Physical Demands

The physical demands described here are representative of those that must be met to successfully perform the essential functions of the internship. Reasonable accommodations may be made.

- Regularly required to sit; use hands to finger, handle or feel; and talk or hear
- Occasionally required to lift/move up to 20 pounds
- Vision requirements include ability to use a computer and adjust focus