

## Customer Service Representative

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**Code:** Not specified

**Level:** Professional

**Job Family:** Customer Service

**Summary:** As a Customer Service Rep. you will be an important member of the team responsible for maintaining customer relationships. You will interact on a daily basis with both key accounts and the sales team. You will process and maintain customer orders; analyze and prioritize information, working closely with production department to ensure timely delivery. You will be expected to have effective organizational skills, and be able to keep files and work area well organized.

**SMEs:** Not specified

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### Requirements

Demonstrates ability to respond and cope with evolving work demands and to work in a fast paced, multi-task environment

### Education

Highschool degree required. College degree preferred.

### Experience

At least 3 years of customer service experience. Phone sales experience or sales background.

### Task Groups

#### A - Functional/Technical (100)

- Takes orders, answers questions, and resolves issues
- Solicits new business
- Determines charges for service requested and collects deposits/fees
- Calculates quotes, costs, and/or credits
- Assists customers in warranty issues and exchanges
- Confers with customer by phone or in person to receive orders for installation, turn-on, discontinuance, or change in service
- Completes contract forms, prepares change of address records, and issues discontinuance orders, using computer
- Resolves billing or service complaints and refers grievances to designated departments for investigation

#### B - People and Team Effectiveness (60)

- Keeps up to date on products and or services
- Attends product orientation
- Works collaboratively with others and strives to achieve team goals

#### C - Administrative/Miscellaneous (20)

- Organizes, processes and maintains written records, computer records and a variety of information
- Dispatches trouble reports

### Competencies

#### 1 - Adaptability (7.4%)

Maintains effectiveness in a variety of situations involving change such as different tasks, processes, and people.

##### Behaviors

- Adjusts responses and actions to fit changing job requirements or customer needs.
- Demonstrates an open-minded attitude toward diverse opinions, people, and events.
- Accepts changes positively in the organization's structure or culture.
- Skillfully applies rules or standard procedures when faced with a unique situation.
- Applies critical thinking to address multiple demands and competing priorities in a changing environment.
- Works well with all levels and types of people.
- Seeks information and responds quickly and successfully to situations created by changes or unanticipated problems.
- Assists employees with understanding the change process.
- Helps build support of others when changes occur.

DPL: 5 - Expert

*Linked To Task Group(s): A, B, C*

**2 - Communication (6.5%)**

Competency comprised of behaviors that demonstrate and ability to convey one's thoughts in an articulate manner and compelling manner.

SME: Jim Graber, Organizational Psychologist, PhD  
Last Updated: July, 2012

**Behaviors**

- Communicates clearly both verbally and in writing by using correct vocabulary, diction, volume, grammar and punctuation.
- Communicates negative, difficult or sensitive messages effectively.
- Effectively and appropriately uses multiple channels to communicate e.g. email, telephone, texting, meetings, newsletters, etc.).
- Ensures that important information is shared with and understood by others in an accurate, timely manner.
- Simplifies complex issues or information and communicates these in easily understood language.
- Expresses viewpoints in a straightforward manner by being open and direct with others as needed.
- Supports the open expression of ideas.
- Challenges those who demean others' ideas.
- Uses effective body language and gestures that add to the impact of the information communicated.
- Adjusts language and terminology to suit the audience.
- Accurately hears and understands others' thoughts, feelings and concerns.
- Checks for understanding of communications as appropriate.
- Effectively used communication techniques such as humor, stories, illustrations, voice tone, etc. to gain and hold attention.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, B*

**3 - Conveying Competence (7.4%)**

Conveys a sense of competence and effectiveness to customer.

**Behaviors**

- Demonstrates knowledge of customers' record and is up to speed quickly.
- Keeps promises and is reliable; stays true to word.
- Goes above and beyond expectations, putting in the extra effort.
- Takes responsibility for mishaps, mistakes and product/service failure.
- Is always available and able to be reached so customers have access to live assistance.
- Increases competition by raises customer service standards and forcing businesses to pay more attention to satisfying their customers.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, B, C*

**4 - Customer Focus (6.5%)**

Understands internal and external customer requirements and provides services or develops solutions that meet their needs.

**Behaviors**

- Actively seeks information to develop an understanding of customer needs.
- Assesses daily operations and suggests changes to better meet customers' needs.
- Develops and maintains effective customer relationships by meeting commitments and building trust.
- Monitors new services and trends in order to keep in close touch with the needs and perspectives of customers/markets and takes actions accordingly.
- Integrates internal and external customer feedback into the work of the organization.
- Promotes a customer driven organization by defining and clearly communicating customer service expectations to the workforce and through a relentless effort to understand and deliver to the customer.
- Ensures that the customer is central to all business activity.
- Solicits information from customers about how the organization can better meet their needs.
- Gives high priority to customer satisfaction.
- Identifies issues with customer service or systems and seeks to rectify or reports to appropriate persons.

*DPL: 5 - Always*

*Linked To Task Group(s): A, B*

**5 - Customer Service Knowledge (4.1%)**

Adheres to employer's customer service procedures and policies.

**Behaviors**

Aims to exceed expectations and win customers over with the quality of service.

Tailors service experiences to customer and the particular circumstances.

Demonstrates good judgment in making decisions about sales relationship and strives to preserve, even improve it.

Always brings a good attitude, enthusiasm and patience, combined with expert knowledge of products/services.

Understands customer service standards and general principles, but knows when and if to bend the rules.

Deals with various different types of issues and situations, even if experience is unfamiliar.

*DPL: 5 - Expert*

*Linked To Task Group(s): A*

**6 - Enthusiasm (2.4%)**

Exhibits charisma, excitement and a positive "can-do" attitude.

**Behaviors**

Helps others through difficult times by maintaining a positive outlook.

Displays a cheerful demeanor.

Inspires others to perform at superior levels.

Demonstrates excitement and enthusiasm about the direction in which he or she is headed.

Persists in pursuing goals despite obstacles and setbacks.

*DPL: 5 - Expert*

*Linked To Task Group(s): B*

**7 - Gathering and Using Information (3.3%)**

Gathers relevant information and uses it to provide a fact-based rationale for decisions and actions.

**Behaviors**

Effectively gathers information which is relevant to the task at hand and is accurate and timely, i.e. uses reputable sources and means to obtain information quickly.

Finds additional or unique information with ease, and only when necessary.

Analyzes information from multiple viewpoints.

Identifies connections and patterns in information to develop strategic solutions.

Effectively uses a variety of methods to obtain information to prevent delays, i.e. has multiple contact persons, knows the best way to reach contacts, appropriately uses technology, etc.

Focuses on the relevant critical issues without getting caught in too much detail.

Logically evaluates collected information to make informed and valuable recommendations for the organization.

*DPL: 5 - Expert*

*Linked To Task Group(s): B, C*

**8 - Handling Dissatisfaction (4.1%)**

Handles dissatisfaction or negative feedback, defuses negative situations.

**Behaviors**

Shows diplomacy and tact in actions and words.

Guides situation toward positive resolution without being too quick to jump to a conclusion.

Addresses issues and does not simply seek to hide them through refund, compensation, etc.

Instills confidence that problems will not occur in the future.

Gives complaints full attention and aim to please one person at a time.

Seeks to gain repeat customers and leaving them happy enough to pass on positive feedback about business.

*DPL: 5 - Expert*

*Linked To Task Group(s): A*

**9 - Initiative (2.4%)**

Seeks out opportunities to provide additional value.

**Behaviors**

Self-starts rather than waiting for direction to act.

Takes action, instead of simply thinking about future actions.

Finds ways to overcome barriers.

Promotes initiative in others.

Holds self accountable for actions and ideas.

Addresses existing and potential problems within his or her realm of responsibility without direction from others.

Looks for new opportunities to provide value.

When appropriate to involve others, alerts the appropriate individuals concerning opportunities or issues that need to be addressed.

*DPL: 5 - Expert*

*Linked To Task Group(s): B*

**10 - Knowledgeable on Products (4.1%)**

Keeps current and knowledgeable on products or services.

**Behaviors**

Keeps up-to-date with new product developments and additions.

Understands limitations of products/services.

Allows knowledge of products/services to generate immediate solutions.

Demonstrates knowledge of potential problem areas and simple resolutions.

Ensures customer does not feel more knowledgeable of products/services through solid performance.

Provides experienced point of view and shows understanding not just of product features, but of applications and uses as well.

*DPL: 5 - Expert*

*Linked To Task Group(s): A*

**11 - Learning Agility (7.4%)**

Continuously learns from one's experiences, from other people and from available resources.

**Behaviors**

Leverages multiple learning opportunities such as reading, attending seminars, networking and/or memberships in professional organizations.

Analyzes successes and failures to learn from them.

Applies learning from training courses or other sources on-the-job.

Sets personal and professional development goals.

Solicits and accepts feedback without defensiveness.

Contributes to the learning of others.

Prepares for learning by identifying issues and opportunities to be addressed, and what is known about the topic and what must be learned.

Willingly takes on new tasks or puts oneself in unfamiliar situations in order to learn.

Displays an open mind, willingly listening to ideas and thoughts that differ from his or her own.

Learns from setbacks or failures as well as from successful efforts.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, B, C*

**12 - Maintaining Records and Files (4.8%)**

Organizes, updates and maintains a variety of information including paper records and digital documents such as computer files.

**Customer Service Representative**

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**Behaviors**

- Effectively utilizes the company's organization method for storing written and digital files, i.e. stores them properly and accurately.
- Maintains logical organization of documents both in paper form and digital form, i.e. file are properly names, organized by type, date, or title, etc.
- Stores information in a manner which allows quick and easy retrieval upon request.
- Develops systems to allow for easy information retrieval in the absence of persons primarily responsible for record maintenance.
- Identifies incomplete or incorrectly labeled records and takes corrective action.
- Maintains appropriate back-up of electronic and paper documentation, i.e. creates paper copies of important documents stored in an alternate safe location, uses disks and hard drives to create digital copies of important files on a regular basis, etc.
- Takes necessary effort to protect confidentiality of all records.
- Consistently complies with applicable laws and company rules pertaining to record keeping, i.e. follows all compliance and privacy laws.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, C*

**13 - Making Referrals (2.4%)**

Makes referrals to others that best serve the customer.

**Behaviors**

- Recognizes important relationships can be formed through referrals.
- Determines when needs have not been met and a referral is necessary.
- Provides appropriate and timely referrals when additional/alternative services are needed.
- Even when qualified to meet needs, makes prompt referral if organization cannot respond immediately.
- Understands that mutually beneficial referrals build customer trust and valuable business relationships.
- Uses thorough knowledge of available resources to make informed referral.

*DPL: 5 - Expert*

*Linked To Task Group(s): B*

**14 - Organizational Knowledge (6.5%)**

Applies an understanding of the organization's formal structure, policies, regulations and products/services to accomplish work tasks efficiently.

**Behaviors**

- Demonstrates an understanding of how one's own work impacts the success of the organization.
- Identifies key stakeholders and knows who to communicate with for information on a given project, problem, approval, etc.
- Understands the work of a variety of departments and groups within the organization, uses this knowledge to effectively meet personal and organizational goals, complete tasks, etc.
- Uses knowledge of the organization's reporting structure for efficient communication and decision making.
- Understands what drives profitability in the business.
- Accurately identifies the markets served and what needs to be done to serve those markets better.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, B*

**15 - Persuasiveness (4.1%)**

Uses appropriate interpersonal styles and communication methods to influence and gain acceptance of an idea, plan, activity or service.

**Behaviors**

- Gains commitment or acceptance by using data, arguments or other communication methods.
- Exhibits a great deal of charisma, or may exhibit quiet credibility and use soft-sell techniques.
- Using different arguments, examples or data if the initial attempt at persuasion was unsuccessful.
- Presents a logical argument, an emotional argument, and an ethical argument in persuasion attempts.

*DPL: 5 - Expert*

*Linked To Task Group(s): A*

**16 - Problem Solving (4.1%)**

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Competency composed of behaviors that demonstrate the ability solve work-related problems in a logical manner.

SME: Jim Graber, Organizational Psychologist  
Last Updated: July, 2012

### Behaviors

Takes logical and systematic approaches to solving problems. Thoroughly analyzes all aspects of the problem and brainstorms alternative causes and solutions.

Identifies and prioritizes significant problems and opportunities.

Breaks complex problems into simpler parts so that they can be dealt with more effectively and efficiently.

Considers resource constraints when generating solutions.

Pilot tests solutions to problems before fully rolling them out when appropriate.

Effectively uses available data and resources such as written information and/or subject matter experts to solve problems.

Clearly states and defines the problem to be solved.

Regularly evaluates progress on problem resolution and revises approach when necessary to improve results.

Provides clarification and support to others that will implement problem solutions.

Considers organizational values when generating solutions.

Avoids jumping to conclusions prematurely.

*DPL: 5 - Expert*

*Linked To Task Group(s): A*

### 17 - Professional Telephone Skills (6.5%)

Uses proper openings and closing and services and controls customer calls.

### Behaviors

Answers the phone promptly and is available when customers need assistance.

Actively listens and pays attention to what customers have to say and does not make them repeat themselves.

Is helpful even if there is no immediate profit involved.

Avoids putting customers on hold and transferring.

Is enthusiastic and conveys concern for the issues and situation at hand.

Understands that customers can tell when you are smiling even though you're on the phone.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, B*

### 18 - Questioning (2.4%)

Elicits information from others to encourage a problem-solving approach to thinking and learning.

### Behaviors

Determines needs, opinions or other information, and asks others about their experiences on the job.

Encourages thinking aloud and exploratory approaches to tasks.

Uses open-ended questions to open up a discussion, and uses questions such as (what are your views on; how do you feel about ; tell me a little about; could you give me your impressions of, etc).

Probes to clarify comments.

Elicits comments, concerns, and other information that is helpful for effective organizational change.

*DPL: 5 - Expert*

*Linked To Task Group(s): B*

### 19 - Self-Confidence (6.5%)

Demonstrates certainty in one's own self-worth, skills and abilities.

**Behaviors**

- Maintains a strong belief in one's own skills and decisions.
- Demonstrates confidence in own ability to meet challenging goals.
- States opinions and positions clearly and confidently, conveying a sense of authority.
- Displays strong "presence" in a variety of situations.
- Shows conviction in decisions, beliefs and attitudes.
- Remains calm and assured, even when faced with challenging or stressful situations.
- Conveys confidence through upright posture and open body language.
- Able to voice views that are unpopular and go out on a limb for what is right.
- Is equally comfortable with promoting self and others.
- Effectively uses posture, demeanor, and professional attire to convey confidence.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, B*

**20 - Teamwork (2.4%)**

Works effectively with other teammates in accomplishing tasks and goals.

**Behaviors**

- Asks for ideas and proposals from other team members.
- Maintains a focus on team goals and assists others in accomplishing them.
- Supports team decisions which benefit the organization regardless of one's own personal viewpoint.
- Places team goals above personal goals, making sacrifices in support of team goals as necessary.
- Works well within teams that conduct work across the organization, i.e. different departments, sites, etc.
- Recognizes and acknowledges the contributions of other team members.
- Actively shares knowledge, experience, and ideas with other team members
- Shares responsibility for successes and failures
- Dynamically senses needs of the team and alternates between roles of leading, following, and partnering as appropriate.

*DPL: 5 - Always*

*Linked To Task Group(s): B*

**21 - Using Reference Sources (4.8%)**

Obtains information from reference sources and supplies customer with needed information.

**Behaviors**

- Goes beyond directing customer to needed information, by obtaining and delivering it.
- Supplies necessary information in a timely manner, without delay.
- Supplies necessary information without transferring customer and directing them to other personnel.
- Understands reference source arrangement, purpose and demonstrates ability to use quickly and efficiently.
- Quickly identifies the question and the appropriate course of action.
- Promptly recalls information that may be helpful before beginning to properly address issue.

*DPL: 5 - Expert*

*Linked To Task Group(s): A, C*

**Job Characteristics**

**Independence:** 2 - Slight Independence

**Teamwork:** 2 - Some Teamwork Required

**Frequency of Review:** 4 - Frequent Review

**Pace:** 3 - Fast-Paced

**Stability of Priorities:** 2 - Frequently Changing Priorities

**Variety of Tasks:** 3 - Moderate Job Variety

**Travel:** 1 - Seldom or never Travel

**Physical Requirements:** 1 - Little or no Physical Requirements

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**Interaction:** 5 - High Interaction

**Concreteness:** 4 - Primarily Concrete

**Analysis:** 3 - Mixed Analysis & Action

**Structure:** 3 - Moderate Structure

**Influence on Others:** 1 - Very Low Influence over Others

**Interaction with Sr. Mgmt.:** 1 - Low Interaction with Sr. Mgmt.

**Multi-Tasking:** 4 - Usually Multi-Tasking

**Administrative Burden:** 4 - Significant Administration