

CUSTOMER SERVICE REPRESENTATIVE SERIES

<u>Code No.</u>	<u>Class Title</u>	<u>Occ. Area</u>	<u>Work Area</u>	<u>Prob. Period</u>	<u>Effective Date</u>
4807	Customer Service Assistant Representative I	02	215	6 mo.	00/00/00
4808	Customer Service Representative II	02	215	6 mo.	00/00/00
4809	Customer Service Associate Representative III	02	215	6 mo.	00/00/00

Promotional Line: 343

Series Narrative

Employees in this series provide customer related services and interfaces with campus clients to ascertain, promote, and monitor the quality of services provided. The primary focus of positions in this series is customer service.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Customer Service ~~Assistant~~ Representative I 4807

Employees in this class are entry level representatives who receive training in departmental rules, regulations, and policies and provide basic informational services to campus clients. They work under direct supervision from higher personnel.

A Customer Service Representative I typically –

1. creates, updates, revises and retrieves records and files of average difficulty, which may include confidential materials
2. responds to routine inquiries from customers in order to provide or clarify information on departmental services, policies, and procedures
3. greets visitors, determine nature and purpose of visit, direct and/or escort them to destination, provide information regarding organization and employees.
4. resolves customer service complaints
5. maintains record of customer interactions and transactions, recording details of inquiries, complaints and comments including any action taken
6. reports customers feedback, identifies problems and trends, and suggests resolutions
7. transmits information or documents to customers using computer or fax
8. composes correspondence and creates other documentation/records
9. refers unresolved customer grievances to designate personnel for further investigation
10. performs administrative support tasks such as proofreading and correcting errors, transcribing and keyboarding such correspondence, narrative reports, operate office equipment calculators or computers

11. assists higher level personnel in examining and maintaining departmental records and reports
12. researches inquiries and provides point of contact for quality control concerns
13. sorts and distributes mail
14. receives payment for fees, bills, and assessments issued by the institution; verifies amount due as shown on statement against payment offered, gives change if necessary, issues receipt, and deposits payments received, within a framework of explicit procedures and instructions and subject to minimal personal discretion
15. balance daily transactions
16. receives, verifies, and processes cash sales
17. performs other related duties as assigned

Level II: Customer Service Representative II**4808**

Employees at this level are journey-level representatives who provide standard informational services to campus clients. They work under general supervision from higher level personnel.

A Customer Service Representative II typically –

1. greets visitors, determine nature and purpose of visit, direct and/or escort them to destination, provide information regarding organization and employees
2. responds to routine inquiries from customers in order to provide or clarify information regarding departmental services, policies, and procedures
3. assists higher level personnel in examining and maintaining departmental records and reports
4. resolves customer service complaints
5. refers unresolved customer grievances to designate personnel for further investigation
6. creates, updates, revises and retrieves records and files of average difficulty, which may include confidential materials
7. maintains record of customer interactions and transactions, recording details of inquiries, complaints and comments including any action taken
8. contacts customer to respond to inquiries or to notify them of outcome or resolution of issues such as claim results, planned adjustments or other action taken
9. transmits information or documents to customers using computer or fax
10. performs administrative support tasks such as proofreading and correcting errors, transcribing and keyboarding such correspondence, narrative reports, operate office equipment calculators or computers
11. composes correspondence and creates other documentation/records

12. reports customers feedback, identifies problems and trends, and suggests resolutions
13. sorts and distributes mail
14. receives payment for fees, bills, and assessments issued by the institution; assists or advises other cashiers in handling unfamiliar transactions in accordance with established guidelines and subject to limited personal discretion
15. balances daily transactions
16. receives, verifies, and processes cash sales
17. serves as public-relations contact, provides information, and assists with solving problems (such as ticket exchanges, refunds, or lost or stolen tickets); verifies account numbers
18. may perform duties of lower level employees in this series
19. performs other related duties as assigned

Level III: Customer Service Associate Representative III 4809

Employees at this level are senior representatives who provide special assistance to clients or review and analyze client activities or attitudes; they may also supervise subordinate employees. They work under general supervision from higher level personnel.

A Customer Service Representative III typically –

1. resolves customer service complaints
2. creates, updates, revises and retrieves records and files of average difficulty, which may include confidential materials
3. responds to routine inquiries from customers in order to provide or clarify information regarding departmental services, policies, and procedures
4. serves as primary contact point for customers in various situations
5. establishes, modifies, and/or supervises the maintenance of comprehensive file and record systems
6. communicates with customers and provide assistance with complex situations
7. reviews documents to determine adequacy or acceptability of information provided
8. answering questions requiring the application of regulations and procedures to specific problems or transactions
9. composes substantive correspondence, memos and reports containing subject matter knowledge
10. assigns work, reviews work and evaluates assigned staff
11. signs/approves correspondence, requisitions and vouchers; authorizes various transactions processed by unit

12. serves as a liaison between the unit, internal staff, external units, and outside agencies
13. monitors the operating budget; assists in the preparation of budget analysis and various reports
14. performs or assists in the interviewing, employment hiring, and discipline of staff
15. may perform duties of lower level employees in this series
16. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Customer Service Assistant Representative I

4807

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination that equals **18 months** from the categories below:
 - (a) responsible experience in customer services, public relations, office and administrative support
 - (b) credit for 60 semester hours of college training (24 semester hours of which were in business administration, communications, public relations, or other fields involving public/social relations)
 - 60 semester hours or an Associate's degree equals 18 months

~~3. Valid Illinois driver's license if an essential function of the position~~

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Customer service – Public Relations
(i.e., ability to deal with the public and clients in a friendly, positive manner to achieve customer satisfaction)
2. Grammar
(rules of composition, punctuation, etc.)
3. Clerical
(managing files and records, designing forms, managing inventory, etc.)
4. Mathematics
(i.e., knowledge of arithmetic, algebra, statistics, and their applications)
5. Reading Comprehension
(i.e., understanding written sentences and paragraphs in work related documents)

6. Time Management – Scheduling
(i.e., managing one's own time and the time of others)
7. Communication Skills
(i.e., ability to relay information in speaking so others will understand and to understand what others are saying)
8. Supervision
(i.e., ability to coordinate and oversee activities of subordinates)
9. Information Technology Skills
(word processing, spreadsheets, etc.)

Level II: Customer Service Representative-II**4808**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination that equals **3 years (36 months)** from the categories below:
 - (a) responsible experience in customer services, public relations, office and administrative support
 - or
 - (b) credit for 120 semester hours of college training (48 semester hours of which were in business administration, communications, public relations, or other fields involving public/social relations)
 - 60 semester hours or an Associate's degree equals 18 months
 - 90 semester hours equals 24 months
 - 120 semester hours or a Bachelor's degree equals 36 months
- ~~3. Valid Illinois driver's license if an essential function of the position~~

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Customer service – Public Relations
(i.e., ability to deal with the public and clients in a friendly, positive manner to achieve customer satisfaction)
2. Grammar
(rules of composition, punctuation, etc.)
3. Clerical
(managing files and records, designing forms, managing inventory, etc.)
4. Mathematics
(i.e., knowledge of arithmetic, algebra, statistics, and their applications)

5. Reading Comprehension
(i.e., understanding written sentences and paragraphs in work related documents)
6. Time Management – Scheduling
(i.e., managing one's own time and the time of others)
7. Communication Skills
(i.e., ability to relay information in speaking so others will understand and to understand what others are saying)
8. Supervision
(i.e., ability to coordinate and oversee activities of subordinates)
9. Information Technology Skills
(word processing, spreadsheets, etc.)

Level III: Customer Service Associate Representative III 4809

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. High school graduation or equivalent
2. Any one or any combination that equals **3 years (36 months)** from the categories below:
 - (a) responsible experience in customer services, public relations, office and administrative support
 - or
 - (b) credit for 120 semester hours of college training (48 semester hours of which were in business administration, communications, public relations, or other fields involving public/social relations)
 - ~~60 semester hours or an Associate's degree equals 18 months~~
 - ~~90 semester hours equals 24 months~~
 - ~~120 semester hours or a Bachelor's degree equals 36 months~~
 - ~~120 semester hours or a Bachelor's degree equals 36 months~~
3. ~~—~~ **One year (12 months)** of work experience comparable to that gained as a Customer Service Representative II
4. ~~Valid Illinois driver's license if an essential function of the position~~

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PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. Customer service – Public Relations
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2. Grammar
(rules of composition, punctuation, etc.)

3. Clerical
(managing files and records, designing forms, managing inventory, etc.)
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(i.e., knowledge of arithmetic, algebra, statistics, and their applications)
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(i.e., ability to coordinate and oversee activities of subordinates)
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(word processing, spreadsheets, etc.)