

## **Coordinator/Customer Services Representative - Job Standards**

Job Standards include: (Note: this is a representative list only - complete list provided with purchase)

### KNOWLEDGE OF WORK:

Knows what is expected of the Customer Service function in the organization and plans, organizes, co-ordinates and controls work processes (technological application and staffing) accordingly

Has a thorough knowledge of all organization products and services; required procedures and processes involved in providing them; and, all related fees, charges, interest rates, costs and benefits associated with the use of all organization products and services

Has a complete and thorough understanding of organization philosophy, the organization's Mission Statement, its Service Philosophy Statement, and Service Excellence Goals

Knows how to cross sell organization services and products and train others to do likewise, effectively and productively

### QUALITY OF WORK:

Effectively schedules staffing for Customer Services Department to ensure prompt and efficient service delivery in person or by telephone during all business hours

Maintains data and statistics on service delivery demands and implements response systems (staffing, scheduling, internal processing) that provide fast, efficient and effective response to customers service needs

Successfully maintains a cross selling program that results in an average account relationship of \_\_\_\_ per customer (average number of accounts each customer has)

Approves loans up to a maximum of \$00,000 when required to perform Loan Officer work  
Provides customer service decision in a timely manner (within xx minutes, 00% of the time)

Has no more than x% customer service complaints within each three month period

### QUANTITY OF WORK:

Organizes department's capability to respond to 100% of individual service requests within each business day, and successfully complete no less than 00% of those requests

Ensures every business transaction is accurately completed, accounts are balanced, and appropriate transactions are recorded, and customer records are updated on a daily basis

Meets corporate sales goals: new product sales, dollar volumes, and service defect-free targets

Provides hands-on support to department staff regarding complex product and customer service issues

Continuously examines work processes and prepares trend reports for further analysis and improvement. Implements TQM (Total Quality Management) work processes in department.

### PROBLEM ANALYSIS:

Approaches problems as opportunities and finds ways and means of resolving them

Studies processing system/methods and looks for ways to improve staff utilization, productivity, response time, and overall efficiency

Considers the cost/benefit relationship of all problems before striking out on any particular course of action