

Customer Service Representative I - Job Standards

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

KNOWLEDGE OF WORK:

- Has a sound understanding of the organization philosophy and differences between organization and competitor financial institutions
- Knows how to perform all Teller functions: maintain cash, balance, post entries
- Has a complete knowledge of basic customer services and financial products
- Is familiar with Products/Services Manual and how to access appropriate information
- Knows how and when to cross sell products and services to customers

QUALITY OF WORK:

- Uses telephone productively; returns all phone calls within one hour
- Promptly deals with all customer service transactions, processes entries, corrections, amendments, and correctly completes all daily work in a timely manner
- Has no more than one (1) customer complaint every six months
- Waits on the customer within 2 minutes after being called (95% of the time)
- Knows how to effectively deal with dissatisfied customers and resolve dissatisfaction
- Confirms with customers that they have a correct understanding of products and services

QUANTITY OF WORK:

- Works to established standards for processing each type of transaction (e.g., error correction 3-5 minutes, check order 2 minutes, change of address 1 minute, etc.)
- Successfully cross sells an average of three organization products daily
- Opens a minimum of 15 new savings or checking accounts weekly

PROFESSIONALISM:

- Keeps customers' business confidential at all times; no exceptions
- Observes the organization's dress code and personal grooming policy
- Promotes the goals and objectives of the organization
- Presents a neat and professional work area