

## **Registered Customer Services Representative (RCSR) - 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's philosophy and differences between organization and competitor financial institutions products and services, fees and charges
- Knows how to perform all Teller functions: maintain cash, balance, post entries
- Has a complete knowledge of all customer services and financial products
- Is familiar with Products/Services Manual and knows how to access appropriate information
- Knows how and when to cross sell products and services to customers
- Knows mutual funds and annuity products and can explain them to purchasers
- Knows the rules and regulations related to sale of mutual funds and annuities

### 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
- Accurately completes all forms, documents and legal requirements and files them within the appropriate time frame and in accordance with filing requirements.

### 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
- Deals with more complex customer service issues and resolves in a timely manner
- Achieves sales quotas for sale of mutual funds and annuities

### COOPERATION/RELATIONSHIPS:

- Relates well with the customers, co-workers, supervisor, and general public
- Is a team player: willing to assist others in work group when needed
- Demonstrates a positive attitude, patience, empathy, and understanding
- Offers and receives criticism in a constructive manner
- Strives to create a team concept; sets an example for others to follow