

Customer Services Representative II - 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 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

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
- Deals with more complex customer service issues and resolves in a timely manner

PROBLEM ANALYSIS:

- Resolves inquiries and complaints within defined authority
- Assists Customer Service Rep I with difficult problems or refers problems to supervision when necessary
- Considers pros and cons of possible solutions and offers options to customers
- Considers problems as a challenge and opportunity