

Customer Service Representative/Receptionist - Job Standards

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

KNOWLEDGE OF WORK:

- Is completely familiar with service manual, teller training manual and policies
- Test scores for service manual, teller training manual are 100%
- Verifies that proper procedures are followed (i.e. Reg CC and IRA w/d) in preparing documents
- Has complete knowledge of phone system and can route the calls to the proper person or take correct and complete call backs
- Can do notary work and signature guarantees

QUALITY OF WORK:

- Follows through on tasks, paperwork and customer's request
- Remains composed with irate customers
- Cross sells services whenever possible
- No customer complaints about employee's attitude, behaviour or service delivery
- Organized and accurate daily work (includes zero posting errors)
- Does back office work in a timely manner (i.e., account cards, etc.)
- Properly documents assigned tasks and repetitive processes and reports
- Verifies receipt of all packages before signing for them

PROBLEM ANALYSIS:

- Identifies problems with customers and, as appropriate, resolves them
- Gathers relevant information concerning more involved problems, refers to others for resolution
- Develops a number of possible solutions to problem before going to supervisor for answer

ATTENTION TO SAFETY/SECURITY:

- Signs off computer when leaving work station; ensures customer and organization information is left unattended for others to read
- Maintains secrecy of password and combinations under control of job holder
- Ensures tools, electrical cords and personal items are properly stored
- Ensures security measures are in place and being followed (i.e. confidential documents not left unattended) and ensures security equipment and procedures are being followed
- Is aware of and controls safety and security procedures for visitors and customers
- Knows policy on bomb threats and extortion, and what to do should such incidents occur
- Makes sure all customer information, regardless of its nature, is kept confidential