SARASOTA COUNTY GOVERNMENT
CAREER TRACK

CUSTOMER SERVICE REPRESENTATIVE

Sub-Class Code: See Below
EEO Code: 06
FLSA: Non-Exempt
W/C Code: 8810
Pay Band: Operational Service Support

MAJOR FUNCTION(S)

Work in this career track involves providing contact and response to County customers and citizens providing information from all departments and divisions. Contacts are usually via telecommunications in County units including, but not restricted to, Contact Center Operations, Library Operations, Emergency Operations Center (EOC), Parks & Recreation, Utilities, Administration Center Reception Desk and the 911 Call Center.

Primary Purpose

Customer Service Representative Sub-Class Code 31212 - Pay Grade 9912	***Customer Service Representative, Senior** Sub-Class Code 31213 - Pay Grade 9913
Duties and tasks are typically routine and standardized. Resolves most questions and problems and refers more complex issues to a Senior Customer Service Representative. This is entry level work. **Work assignments at this level include, but are not limited to:** ▪ Provides internal/external customer service ▪ Answers telephones and addresses routine customer questions, concerns, inquiries ▪ Refers calls, questions, and issues to appropriate unit or resource as needed ▪ Processes work orders/service requests/ library cards ▪ Types/enters information into databases ▪ Provides directions, maps, assistance ▪ Handles reception/service desk duties ▪ Handles cashier duties ▪ Prepares mailings ▪ Compiles & logs information ▪ Adheres to/explains policies and procedures ▪ Answers billing and account questions ▪ Utilizes computer programs ▪ Registers customers for classes ▪ Maintains main lobby/reception area inventories ▪ Receives and processes books and payments ▪ Inspects, repairs, maintains, sorts and shelves materials ▪ Maintains supply inventories ▪ May operate radio equipment and dispatch workers ▪ Attends meetings and education sessions ▪ Promotes materials through displays and sign placement	**Duties and tasks are frequently non-routine and reflect substantial variety and complexity. May serve as a resource to others in resolving complex problems and issues. This is senior level Customer Service work.** **Work assignments at this level include, but are not limited to:** ▪ Addresses more complex customer concerns, questions, inquiries ▪ Handles escalated issues and calls ▪ Provides assistance and support to CSRs ▪ Responds to correspondence ▪ Assists in scheduling work assignments ▪ May serve as CSR Lead ▪ Assists with coaching, mentoring, and training of staff ▪ Assists in writing, editing, and reviewing FAQ's ▪ Helps solve problems and contributes to improvements ▪ Prepares, reviews and monitors reports prior to distribution ▪ Conducts investigations to resolve complex customer issues and concerns ▪ May provide input for performance evaluations ▪ Assists in creating staffing plans ▪ Oversees virtual contact center and service desk supervision ▪ Contributes to development of goals, policies, and procedures. ▪ Assists in certification of others ▪ Conducts research ▪ Works under minimal supervision ▪ Coordinates special projects and assignments ▪ Promotes materials through displays and sign placement ▪ Presents instructional sessions ▪ Guides information searches
*Includes CSR and Senior Level Duties	

Core Competencies (Knowledge, Skills and Abilities)	
Customer Service Representative	**Customer Service Representative, Senior**
Communication Skills	
▪ Demonstrates customer service skills: courteous, sensitive, tactful, with rapport & discretion ▪ Ability to handle tough customers and/or situations ▪ Is a good listener ▪ Communicates well with others ▪ Is open, sincere, and honest ▪ Is inquisitive and intuitive ▪ Speaks clearly and distinctly ▪ Demonstrates excellent grammar, spelling, and language skills ▪ Is courteous/respectful to others ▪ Understands and has working knowledge of communication processes ▪ Supports and respects diversity ▪ Technical knowledge of phone and computer hardware/software required	▪ Demonstrates ability to handle complex & difficult customers/issues ▪ Responds to inquires of a more complex nature ▪ Provides adequate response to policy issues ▪ Sets priorities ▪ Adapts easily and is flexible ▪ Demonstrates good written and verbal communication skills ▪ Builds moral and group commitment to goals & objectives ▪ Organizes and presents information in an organized manner ▪ Is professional and uses tact in dealing with and responding to all customers ▪ Takes initiative to contact customers/ vendors on difficult issues ▪ Uses sound independent judgment ▪ Possesses technical knowledge ▪ Coaches / mentors / leads team/trains ▪ Motivates self and others ▪ Markets unit services/benefits
All levels require ability to establish and maintain effective working relationships.	
Business Equipment and Computer Skills	
Entry level computer skills: ▪ Outlook ▪ Word ▪ Excel ▪ SharePoint ▪ E-Net ▪ Amanda ▪ Maximo ▪ H.T.E. ▪ Works ▪ Electronic Filing Systems ▪ Millennium Use of standard business equipment: ▪ Copier ▪ Calculators ▪ Printers ▪ Phones ▪ Scanners	Advanced skill in computer operations such as: ▪ Outlook ▪ Word ▪ Excel ▪ Sharepoint ▪ E-Net ▪ H.T.E. ▪ On Base ▪ Works ▪ Amanda ▪ Maximo ▪ Electronic Filing Systems ▪ GovMax ▪ e-Genda ▪ Millennium
Measurements – For Contact Center Only	
See attached Career Matrix step 1 & 2	See attached Career Matrix step 3

Minimum Qualifications	
Customer Service Representative	**Customer Service Representative, Senior**
▪ High School Diploma or equivalent education ▪ 1 year experience in clerical or customer service environment is preferred; working knowledge of computer software dealing with public response. ▪ Public Utilities CSRs must have 1-year experience in Utilities or a Call Center Environment. Note: One year of college may substitute for one year of experience.	▪ High School Diploma or equivalent education. ▪ 1-year SCG experience as an Entry Level CSR. ▪ Complete certification or internal TRAC courses as required by BC and/or SCG. ▪ Public Utilities CSRs must have 2-years of experience in related Utilities position. Note: One year of college may substitute for one year of experience.
NOTE: 30 college credits are considered equivalent to one year of college.	

NOTE: Employees that acquire the skills and minimum qualifications for the next level will be able to apply for promotional opportunities. Employees will not automatically be upgraded to the next level. Reclassifying a position is based on business need and financial impact and not based solely on the incumbent.

APPROVED BY: **DATE:**

Chris Louria Digitally signed by Chris Louria Date: 2022.08.03 10:47:06 -04'00'

Chris Louria, Chief Human Resources Officer

History: 7/20/22; 3/20/19; 1/22/19; 6/27/11; 12/20/08

Addendum – Career Matrix for Contact Center Only

CAREER MATRIX – CONTACT CENTER ONLY

Technical Skills

Probationary Period – Step 1 Customer Service Representative (to pass probation)	Step 2 Customer Service Rep.	Step 3 Senior Customer Service Rep.
• Proficient in data entry/typing to create work orders in Maximo, as evaluated by supervisor's review • Maximo in-department training complete and 80% of 20 randomly sampled work orders evaluated as acceptable by Public Works	• Maximo proficiency: 80% of 20 work orders randomly sampled are reviewed and evaluated as acceptable by Public Works	• Maximo proficiency: 90% of work orders randomly sampled are reviewed and evaluated as acceptable by Public Works
• Trained on PBX to accurately transfer calls, and demonstrates ACD skills: demonstrates verbal, compliance with all 10 key call protocols when monitored by supervisor minimally ten times	• 85% score or better - meets standards on calls monitored by supervisor (quality) on 10 key call handling protocols (supervisor monitors calls minimally fifteen times)	• 90% score or better - meets standards on calls monitored (quality) on 10 key call handling protocols
• County orientation and department orientation complete (new employee check list used as documentation)	• All mandatory training completed (Elder Sensitivity, HIPPA, TDD, Orientation, etc.)	• All mandatory training completed (Elder Sensitivity, HIPPA, TDD, Orientation, etc.)
• TDD in-service complete		
• HIPPA class complete		
• Completes Introduction to Incident Command and Emergency Call Taker class	• Completes Introduction to Incident Command and Emergency Call Taker refresher class	• Completes Advanced Incident Command class 400 on line or via TRAC
• Maintains a ratio of 80% cckb hits per calls answered as documented by cckb call reports	• Maintains a ratio of 90% cckb hits per calls answered as documented by cckb call reports	• Maintains a ratio that exceeds 95% cckb hits per calls answered as documented by cckb call reports (more than one FAQ can be accessed per call)
• 75% of 24 sampled average talk times are within 15% either way of overall department average talk time	• 80% of 24 sampled average talk times are within 10% either way of overall department average talk time	• 80% of 24 sampled average talk times are within 10% either way of overall department average talk time

Technical Skills

Probationary Period Customer Service Rep. (to pass probation)	Customer Service Rep.	Senior Customer Service Rep.
• CCKB proficiency – able to locate FAQs by core service, business process, or process activity, most frequently asked FAQs, and by key word 80% of test questions conducted by supervisor	• CCKB proficiency – able to successfully locate FAQs by keyword or text features 90% of test questions answered	• Successfully create new FAQs in call center knowledge base, make suggestions for modifications to existing FAQs.
• Completes Amanda training	• Demonstrates competency in Amanda functions	• Demonstrates competency in Amanda functions
	• GIS Training Complete	• GIS Training Complete
		• Successfully assembles news clippings for distribution to Administration and Commissioners OR • Cross trained and able to process department AP bills, requisitions and monthly PC invoice reconciliations
		• Cross train to generate either Maximo or Symposium call reports
		• Able to provide PBX front office coverage

Leadership

Probationary Period Customer Service Rep. (to pass probation)	Customer Service Rep.	Senior Customer Service Rep.
• Multi-rater by mgr., 3 peers, and internal and external customers rated as overall meets or exceeds	• Multi-rater by mgr., 3 peers, and internal and external customers rated as overall meets or exceeds	• Multi-rater by mgr., 3 peers, and internal and external customers rated as overall meets or exceeds
	• Proactively demonstrates ability to champion change and lead others to accept and participate in change	• Proactively demonstrates ability to champion change and lead others to accept and participate in change

Leadership

	Customer Service Rep.	Senior Customer Service Rep.
	• Demonstrates engagement by making suggestions, contributing to department meeting agendas, participating in one-on-one meetings, and accepting ownership of service excellence, as determined by supervisor or manager	• Demonstrates engagement by making suggestions, contributing to department meeting agendas, participating in one-on-one meetings, and accepting ownership of service excellence, as determined by supervisor or manager
		• Provide leadership role such as supervising a shift(s) during EOC activation, assisting supervisor with special projects, conducting department staff meeting, etc.

Management

		Senior Customer Service Rep.
		• Successfully completes an IDP project (training guide development, organization of field trip for staff, Symposium report generation, etc.)
		• Demonstrates willingness to solve problems, accept escalated (problem) calls to assist Service Center Assistants.

Senior Customer Service Rep. Measurements

- No more than 2 call takers shall be granted approval for SL at one time. 95%

- Comp time coverage shall be provided to cover staffing shortages caused by unscheduled leave. 90%

- All KRONOS payroll shall be reviewed and approved by deadline on alternate Fridays and on special holiday deadlines. 100%

- KPIs are prepared with unit manager and meet GovMax deadlines. 100%

- Random mystery shopping calls are reviewed with call takers for Quality Assurance. Call taker scores are documented to assist in performance evaluations. No less than three calls are reviewed with each call taker weekly. 100%

- Quarterly reports, scorecards and customer service surveys are submitted by the 15th of each month following the close of each quarter. 90%

- Monthly reports are prepared by the 10th of each month. 90%

- Time, attendance, performance and behavior records are maintained and progressive discipline or PIP drafts are prepared in conjunction with the manager's input and TPM's guidance. 100%

- New employees receive and sign for work guidelines; receive orientation and building tour and are trained on policies, procedures, phone protocols and software applications by the Supervisor and are not delegated to call takers. 100%

- All performance evaluations are completed, reviewed and signed on or before due dates. 100%

- Staffing plans are developed and revised as necessary, but no less than semiannually. 100%

- Retention strategy and succession plans are formalized and reviewed with TPM semiannually. 100%

- Virtual call center – all telephone CSRs are monitored via Symposium real time screens and reports, and reviewed with manager. 100%

- Floor supervision is provided and line-of-site is maintained. Incumbent takes calls when volume is high and assists call team with difficult callers or research. 100%

- Goals, strategies and guidelines are communicated verbally and in writing to call team, with staff meetings held no less than quarterly. 100%