

Date completed/ revised: DD/MM/YYYY

Position Details

Title	Customer Service Representative
Reports To	Insert title, not individual's name
Department	Customer Service
Position Status	<input type="checkbox"/> Employee <input type="checkbox"/> Contractor <input type="checkbox"/> Consultant <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> On-going <input type="checkbox"/> Term Term End Date (if applicable): DD/MM/YYYY
Eligible for Benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No Comments if applicable
Overtime Exemption Status	<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt
Variable Compensation	<input type="checkbox"/> Bonus <input type="checkbox"/> Commission <input type="checkbox"/> Shift Premium <input type="checkbox"/> Car Allowance <input type="checkbox"/> Not applicable
Hours per Week	Insert actual expected hours of work per week, excluding breaks or lunch/week
Location	
Job Classification	CUSTOMIZER: If classifications have been established, insert job categories. Below shows an example. Otherwise, delete this row <input type="checkbox"/> Clerical <input type="checkbox"/> Administrator <input type="checkbox"/> Coordinator <input type="checkbox"/> Manager <input type="checkbox"/> Director <input type="checkbox"/> VP
Salary Range	Insert salary range, or insert: "As per Job Classification"
Direct Reports	As of DD/MM/YYYY but subject to change, position is responsible for Insert number direct reports, as follows: ♦ Title. Insert additional bullets as required <input type="checkbox"/> Not Applicable

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A complete HR Toolkit for small business to create and maintain your HR fundamentals.

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- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



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- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

- c. Manages complaints in a manner that leaves the customer satisfied.
- d. Assists customers in returns and collection of the product or service.
- e. Answers questions regarding refunds and warranties.
- f. Upsells when appropriate and informs customer of promotions and sales.
- g. Follows Company policies in order to process customer requests appropriately.
- h. Proactively communicates customer feedback trends to management.
- i. Escalates customer issues to management when necessary.
- j. Ensures customer satisfaction.

2. Insert high-level responsibility Example 20%

- a. List key tasks associated with that responsibility
- b.
- c.
- d.

Job-Related Technical Skills

Skills	Proficient	Experience with	Familiar with
Customer service skills	x		
General computer skills	x		
MS Office suite		x	
A minimum of 35 words per minute typing speed or the ability to use voice to text software to support increasing digital communication and content generation	x		
Enter additional skills if needed			

Experience/Education/Training

Experience/Education/Training	Required	Preferred
A minimum of 1 year in a customer service or call center role where strong multi-tasking skills were required	x	
Participation in call center or customer service training		x

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ATTENTION TO DETAILS

- ◆ Thoroughly accomplishes tasks with the utmost attention placed on accuracy in all areas involved, no matter how small.
- ◆ Monitors and double checks information to produce consistently error-free work.
- ◆ Adheres to procedures and standards.
- ◆ Possesses a strong ability to focus on tasks and priorities amidst continuous distractions.

COMPOSURE / EMOTIONAL MATURITY

- ◆ Maintains composure when provoked, under intense pressure, or faced with multiple priorities.
- ◆ Restrains emotional impulses and responds calmly.
- ◆ Calms others.
- ◆ Demonstrates the ability to maintain stamina under stress.
- ◆ Understands how one's actions affect others.
- ◆ Knows when it's time to leave the room.

INTERPERSONAL SKILLS

- ◆ Effortlessly builds and maintains productive, cooperative relationships with internal and external stakeholders.
- ◆ Demonstrates a strong ability to quickly connect with others, particularly during uncomfortable or stressful situations (such as during the interviewing process).
- ◆ Demonstrates a high Emotional Quotient (EQ) and the ability to read people.
- ◆ Uses tact and diplomacy while still challenging the status quo.

DRIVES FOR RESULTS / TENACITY / BIAS FOR ACTION

- ◆ Strives for results and focuses on reaching goals.
- ◆ Overcomes obstacles, pressure, difficult situations, and conflicting priorities.
- ◆ Sets high performance standards for self and others.
- ◆ Is tenacious, persistent, and resourceful.
- ◆ Translates ideas into action and execution.
- ◆ Understands how to get work done through others.
- ◆ Demonstrates discipline when exposed to distractions.

QUALITY

- ◆ Produces results that meet or exceed standards and expectations.

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Acknowledgement

Accepted and agreed to by:

EMPLOYEE

Employee Name	
Signature	Date

MANAGER APPROVAL

Manager Name	Manager Title
Signature	Date

NEXT LEVEL APPROVAL

All job descriptions require approval by **CUSTOMIZER: Insert approval position level 1. Example: Department VP, or delete this section if not applicable.**

Name	Title
Signature	Date

HR APPROVAL

All positions require review and approval by **HR CUSTOMIZER: Insert HR approval level. Example: HR Manager, or delete this section if not applicable.**

Name	Title
Signature	Date