

CASE ANALYSIS

TRAINING FOR CUSTOMER SERVICE SPECIALISTS

As a part of the president's initiative to remove "barriers to learning" at a regional midwestern university, an analysis of student services operations was conducted. The analysis revealed that the barriers deemed most important by students were those that would delay or prevent them from registering for classes. These barriers fell into three areas:

1. Resolving issues relating to fines accrued over the previous terms (e.g., library, parking, late fees)

2. Completing forms accurately and meeting processing deadlines for financial aid in time to enroll in classes
3. Acquiring appropriate advice so that they enrolled in the right classes (avoiding the problems associated with drops and adds)

As a result of this analysis, the university decided to create a new position called customer service specialist (CSS). The job description is presented here.

Classification Specification
Supersedes: New Classification
Title: Customer Service Specialist
Grade: PT08

General Summary

Supervise, support, monitor, and assist with the continuous improvement of the work unit's customer service functions and related operational activities. Ensure quality customer service, both in person and over the telephone. These activities require a working knowledge of the work unit's program policies, procedures, and regulations and an understanding of other departments and systems that interface with the work unit's activities.

Essential Duties

Personally provide and ensure that customer support staff provide positive customer service practices throughout the work unit, including greeting departmental customers in person or over the telephone, identifying their needs, obtaining necessary and appropriate information, and processing customer requests in a manner that will best meet the needs of the customer.

Monitor staff and ensure that customers perceive customer service support staff as treating them with courtesy, respect, tact, and a sincere desire to meet their needs.

Provide mediation and resolution to customer complaints and requests within delegated authority limits and consistent with departmental policies.

Communicate to customers the departmental policies and procedures related to their needs, and provide customers with the appropriate forms and instructions.

Design and implement systems to ensure that forms turned in by customers are the correct forms for their service request and that they are complete and as accurate as possible.

Work with the appropriate departmental administrator to identify the training needs of designated support staff in the work unit who provide direct customer service. Where called for, provide on-the-job training and coaching. Work with the designated department administrator to identify suitable training experiences for customer service support staff.

Recruit, interview, and make recommendations in the hiring of customer support staff.

Identify processes and procedures in the department that are causing problems for groups of customers (not individuals), and work with department management toward their improvement. Where authorized, implement improvements in systems, processes, and procedures that will increase the customer satisfaction capability of the department.

Develop and maintain a network of contacts with other university departments that commonly interface with the work unit.

Interact with other university departments to resolve a customer's problem, or meet the customer's needs.

Interpret and reconcile account records related to area of assignment.

Receive, read, and interpret correspondence, and determine proper handling.

Perform other related duties as assigned.

Supervision Received

Supervision is received from the designated departmental administrator.

Supervision Exercised

Supervision may be exercised, as determined by the appropriate departmental administrator, over customer service representatives, clerical support staff, and student support staff in the work unit who provide direct customer service.

Qualifications

Ability to read, write, interpret instructions, perform basic arithmetic, and communicate orally and in writing at a level typically acquired through the completion of a college degree is necessary.

Personal computing skills sufficient to use word processing and spreadsheet applications and to perform file management and data input/retrieval functions are necessary. Knowledge of specific software applications and university information systems utilized in the work unit assigned is desirable.

Supervisory skills needed to provide direction to subordinates, monitor and manage subordinate performance, and to plan, organize, and coordinate the customer service activities are required, and supervisory experience is desirable.

Preference is given to those who master basic customer service and problem-solving skills as listed:

- The ability to communicate accurately and pleasantly with customers (across a wide diversity of cultural backgrounds) is necessary to identify customer needs and solve customer problems.
- The ability to communicate moderately to highly complex policies, procedures, and regulations and to ensure understanding of these while working under pressure (e.g., handling several requests at the same time) is required.
- Effective problem-solving abilities are required to (1) identify and prioritize customer service problems, (2) conduct a root cause analysis to determine the cause(s) of a problem, (3) develop a range of alternatives that will remove the cause(s) of a problem, (4) identify the alternatives that are most effective, and (5) develop an implementation plan for carrying out the alternative selected.
- Effective conflict management skills are required (e.g., defuse emotionally charged situations, clearly identify issues, and clearly

communicate procedures for resolving the issue, and working with the customer to develop a resolution acceptable to the customer and the work unit).

- Knowledge and understanding of university, state, and federal policies, systems, procedures, and regulations as they pertain to the work unit's ability to meet customer needs and to areas of the university that interface with the work unit in meeting those needs.

Those hired without the preceding competencies will undergo training before assuming job responsibilities. During the training period, these individuals will be considered temporary employees. Upon successful completion of the training, the classification will be changed to permanent. Failure to complete training successfully will result in termination of employment or reassignment to another position, at the discretion of the university.

Working Conditions

Work is performed in a typical office environment.

After the position was posted and advertised, 25 applicants were selected. Unfortunately, only seven applicants were assessed as demonstrating

the desired level of problem-solving and customer service knowledge and skills.

Case Questions

You are assigned the challenge of designing the training program for the temporary CSS employees, who must complete training before they become permanent CSS employees.

1. What are the training objectives for the CSS training program? Indicate how these objectives are tied to the KSA requirements. Assume that all trainees have college degrees but need KSAs in all other areas listed in the Qualifications section.
2. On the basis of the training objectives, provide a training agenda and indicate the time allocated and order of modules in your program.

3. For each module, describe the goals of the module and the training methods you will use to accomplish it. Provide your rationale.
4. How will you evaluate whether each person in your training program has mastered the knowledge and skill levels needed to perform as a CSS? Describe the types of questions you would ask of those supervising the CSS employees graduating from your program.