



COMMONWEALTH OF PENNSYLVANIA

TREASURY DEPARTMENT

Job Posting – Customer Service Representative

Class Title:	Customer Service Representative
Class Code:	T6015
Office:	Tuition Account Program
Pay Range:	05 - \$40,900
Apply By Date:	March 7, 2022
Work Hours:	8:30AM – 5:00PM
Work Location:	Harrisburg, PA – Finance Building

THE POSITION

This is a non-supervisory bargaining unit position in the Bureau of Savings Programs in the Treasury Department. An employee in this class answers telephone calls placed to the Pennsylvania 529 College Savings Plan/ABLE Savings Plan toll-free line, providing information to those inquiring about opening accounts, as well as to existing account owners.

DESCRIPTION OF WORK

- Front line call center staff is primarily responsible for handling incoming calls from prospective and existing account owners.
- Use background and knowledge of the programs to answer caller's questions.
- Provides excellent customer service and solutions to help callers save and access their funds when needed.
- Researches information in the proprietary computer database.
- At the request of account owners, may change account information such as address, telephone number, tuition level, and investment options, as appropriate.
- Places out-calls to collect information from individuals whose written requests are incomplete or unclear.
- Places telephone calls to individuals who have requested informational and application materials, but who have not yet established an account.
- Collects information from individuals who have sent incomplete applications.
- Responds to correspondence and e-mails, as appropriate.
- Identifies any pertinent information relating to the call center that should be brought to the attention of Management and relays that information to the Customer Service Supervisor.
- Identifies public reaction to program elements and changes that should be brought to the attention of Management and relays that information to the Customer Service Supervisor.
- Identifies caller-related impediments to the application process and relays that information to the Customer Service Supervisor.
- Identifies issues that are particularly compelling to callers and relays that information to the Customer Service Supervisor.

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REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

- Ability and willingness to work occasionally in the evenings and on weekends.
- Physical ability to hear and understand phone callers and to sit at a workstation for prolonged periods of time.
- Ability to articulate clearly and loudly enough to be easily heard and understood on the telephone.
- Ability to take and respond to a large volume of calls in a knowledgeable, pleasant and professional manner.
- Ability to handle disgruntled or angry callers in a manner that defuses the situation and addresses the caller's concern, while adhering to program policy and procedures.
- Ability to document effectively in account files the content of calls regarding the caller's account.
- Ability to identify calls that may provide leads for Field Representatives to promote Business, community and School Partners programs and any other approved marketing incentives, to obtain adequate information for a Field Representative to follow-up, and to transmit that information for follow-up.
- Good judgment; professional discretion, integrity, and ethics.
- Excellent interpersonal and communication skills including: outgoing, persuasive, congenial personality; active listening; being able to help those unfamiliar with the program articulate their questions; social perceptiveness; good reading comprehension; good writing skills; good oral communication skills.
- Ability to acquire in-depth knowledge of Pennsylvania's College Savings Program and ABLE Savings Program, and related topics and ability to effectively convey that knowledge to others.
- Ability to understand, retain and appropriately use all information and resources provided for Customer Service Representatives independently and without the need for repeated supervisory guidance.
- Ability and willingness to work independently with minimal supervision.
- Ability and willingness to work cooperatively and assist other Customer Service Representatives as needed.
- Ability to learn, retain, quickly recall, and explain complex and detailed information.
- Ability to stay focused and on-task while carrying out any work function but especially while communicating with any member of the public.
- Proficiency in using Word, Outlook, and Excel; ability to learn and proficiently use customized computer applications.
- Ability to acquire an understanding of investing including stocks, bonds, and mutual funds.
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- Work experience in the area of finance, sales and/or marketing.
- Work experience in a call center.

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MINIMUM EXPERIENCE AND TRAINING

Bachelor's Degree or Associates Degree in Business or Marketing sales, communications, finance, or similar curriculum; or

Any equivalent combination of education and work experience.

Preferred - Bilingual (Spanish) to provide customer service to Spanish-speaking customers.

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