

## **Customer Service Representative**

**DEFINITION:** 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/Keystone Scholars Program toll-free line, providing information to those inquiring about opening accounts, as well as to existing account owners. Places out-calls to collect information from individuals whose written requests are incomplete or unclear. As time allows, places telephone calls to individuals who have requested informational and application materials, but who have not yet established an account. At the request of account owners, may change account information such as address, telephone number and tuition level, as appropriate. Collects information from individuals who have sent incomplete applications. Responds to correspondence and e-mails, as appropriate. Researches information in the proprietary computer database. 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 Representative 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 Representative Supervisor. Identifies caller-related impediments to the application process and relays that information to the Customer Service Representative Supervisor. Identifies those issues that are particularly compelling to callers and relays that information to the Customer Service Representative Supervisor. On a periodic basis, identifies those questions/issues that appear to be of most concern to callers and relays that information to the Customer Service Representative Supervisor.

### **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, ABLE Savings Program, Keystone Scholars 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.

In addition to the above, an ideal candidate would also have the following:

- Understanding of investing, including stocks, bond, and mutual funds.
- Work experience in the area of finance, sales and/or marketing.
- Work experience in a call center

**MINIMUM EXPERIENCE AND TRAINING:**

Bachelor Degree or Associates Degree in Business or Marketing, and a combination of education and work experience equivalent to a Bachelor Degree.

Ideal: Bachelor Degree in marketing, sales, communications, finance, or similar Education curriculum.

In addition, the ideal candidate would be bilingual (Spanish) to provide customer service to Spanish-speaking customers