222: Customer Service Specialist, Corporate

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Section: Job Description

Subject: Customer Service Specialist, Corporate

Approved by: Tony Massey

Effective Date: 25 January 2002

Last Reviewed Date: 25 January 2002

Policy Owner: Director of Human Resources

Policy

Reports To: **Office Manager**

Summary of Responsibilities

1. **Project A Quality Image**
   - Look, act, and sound professional
2. **Deliver Superior Customer Service**
   - Always be cheerful, courteous and follow through.
   - Use every customer interaction as an opportunity to build relationships
3. **Produce Accurate, Timely Records**
   - Produce quality work within deadlines.
4. **Continually Learn**
   - Embrace every opportunity to learn and develop your skills.

Job Functions & Duties

1. **Deliver Superior Customer Service**

1. *Customer Concerns*
    1. Answer customer calls by the second ring, and with a smile in your voice. Listen patiently to customer concerns.
    2. Locate customer's account on the computer or take all necessary information and ask customer if they are able to hold while you locate account.
    3. Always wait for a response from the customer before placing them on hold. Search for account by address, Alpha or phone number. When returning to customer always use their name and thank them for holding.
    4. Log customer issue in Routeman Special Services and the Notes section (per Service Policy & Procedure #SPP602, and P&P #1802Automated Extra Service Log / Report), documenting specific details regarding issues and requests. Before hanging up with customer, verify the information given: **especially the phone number including the area code**. Using the customer's name, always thank them for calling. Always try to obtain an alternate contact number.
    5. Before the end of each day run a copy of the extra service log and place a copy on Service Manager and or General Manager's desk.
    6. Run no charge invoices daily and put in the Technician's box.

Note: All calls for extra service (complaint calls) must be responded to the same day received and resolved within 24 hours or at the convenience of the customer. See P&P #1802, Automated Extra Service Log / Report for specifics and details.

1. 1. *New Sales*
    1. When answering a lead call be professional, cheerful, courteous and listen carefully.
        1. Take down all information accurately, including name, address phone number, concerns or issues.
        2. Schedule the appointment at the customers convenience
        3. Page the Sales Inspector and relay the information if it is same day appointment.
        4. Record the information in the lead log.

2. As the sale is being closed, the Sales Inspector will call the Customer Service Specialist to schedule the customer for service. The Customer Service Specialist will:
    1. Inform the Sales Inspector or Technician of available day and time using the Start/Install Log.
    2. Log customer information in Start/Install Log under agreed date and time.
    3. In the event the start will require more than one day, or more than one Technician to complete, notify General Manager and/or Service Manager immediately.

3. After receipt of executed sales agreement from the General Manager the Customer Service Specialist will create the account in Routeman and prepare the paperwork for the initial service (i.e. copy of agreement, graph, rate card and cover/startsheet). A manila file is created and folder is placed in a “Sold Not Started” file.
4. After the initial service has been completed, the Customer Service Specialist will:
    1. Verify each new account has been started and if so, remove from start route as long as invoices have been printed. Using Value of Routes and after verifying with Service Manager and/or Technician the Customer Service Specialist will assign route and regular date of service. Remove file from the “Sold Not Started” file and place into the active customer files.

2. *Cancellations-Reinstatements*
    1. When answering a cancellation call be professional, cheerful, courteous and listen carefully.
        1. Take down all information accurately, including name, address phone number, concerns or issues.
        2. Make every attempt to save the customer. (Schedule remedial service, correct billing problem, offer free service, etc. Personnel and service problems must be transferred to the Service Manager/General Manager ASAP.) Determine what we could have done; what should we have done to prevent the cancellation. See P&P #707, Cancellation Prevention Procedures. Never leave the customer with the idea that they have canceled.
        The General Manager is the only one who can authorize a cancellation after talking with the customer.

3. Remove the customer’s folder from Active File and run an A/R copy
4. Fill out Cancellation Request Form. Place the pink copy of form in the Technician’s box and the yellow copy in the Sales Inspectors box.(The Sales Inspector will use this for follow-up in 60-90 days.)
5. Log in Cancellation Log See P&P #707, Cancellation Prevention Procedures
6. Place folder and Cancellation Request immediately on Service Manager’s/General Manager’s desk.
7. Follow the Cancellation procedure (Policy & Procedures #707,Cancellation Prevention Procedures; #708, Cancellation Reasons, & #709, Cancellation Codes) in it’s entirety as outlined in the Office Policy and Procedures Manual.

2. **SPECIAL NOTE**: All service related cancellations are to be contacted in person on All accounts by the General Manager and/or Service Manager. The Customer Service Specialist is charged with the responsibility of making sure the cancellation request is completed in its entirety for use by the General Manager and Service Manager in this contact. Only the General Manager can cancel an account and only after contacting the customer.
3. The Customer Service Specialist receives the approved Cancellation Request back from the General Manager or Service Manager, and if applicable, records on the Cancellation Log. The approved cancellation is then input into the computer.
4. Note: The Customer Service Specialist will file the Customer’s information in the cancellation file cabinet if the account has a zero balance. If the account has a balance due or credit, the file will be given to the Office Manager to begin immediate collection/refund efforts.

3. *Scheduling Reinspections & WDOs*
    1. Contact customers to schedule reinspections using the reinspection appointment book. Schedule reinspections for the same day and location whenever possible. (See Service Policy & Procedure #SPP507, Annual Termite Reinspections)
    2. Schedule WDO’s for the General Manager based on his/her availability and the customer’s convenience.

2. **Producting Accurate & Timely Reports**

1. *Preparing Production for Posting & Recording*
    1. All in-town technicians will report physically to the Service Center each morning or evening. Out-of-town technicians will call the Service Center each morning for messages, instructions, etc. They will then call in the early evening to report their service progress for the day. This will be their accountability check-in call. Out-of-town technicians will also report physically to the Service Center no less than once per week.
        1. Check all service invoices against daily Blue Sheets.
        2. Check service invoices against production indicated on Daily Service Schedule. Verify receipt of collections on Daily Service Schedule and sign.
        3. Review the production reports to insure that there are no customers over two months past due that are being serviced. Bring any such account to the attention of the Office Manager, Service Manager, and Technician.
        4. Record daily production and other information on the Pest Prevention Daily Production Report. The General Manager and Service Manager will review this report daily.
    2. Note: The Daily Production Report will be maintained for each Service Technician in the Service Center. At the beginning of each month the number of units and charges are to be taken from the Value of Routes Report and will be recorded on the Daily Production Report. The Production Reports will be updated daily and all individual route totals will be consolidated and recorded on a consolidated daily production report for the Service Center. The report will be totaled and recapped monthly.
        1. Forward all Service Collections to the Office Manager for preparation of the daily deposit.

2. *Posting Production & Payments*
    1. Post all production and payments by 12:00 in accordance with policies #418, Cash Posting, Pest Control; #419, Cash Posting, Termite & #420, Cash Posting, Termite Renewals.

3. *Maintain Prolinx Database*
    1. Enter new baiting customers into Prolinx in accordance with Policy & Procedure #2100, Baiting Administrative Procedures, assigning the same Routeman account number and “qx” coding if applicable.

2. Print out a copy of the customer’s graph and attach to the invoice.
3. After the Baiting Technician has completed the installation of the baiting stations the Technician will give a copy of the graph with the location of the baiting stations to the Customer Service Specialist for input into Prolinx.
4. Once the stations have been updated, print out a copy of the updated graph and place in the customer’s file.
5. In addition to the initial Prolinx entry, the Customer Service Specialist is responsible for updating the graph for any additions or changes in bait stations.
6. Each afternoon, using the Value of Routes, print out two copies of the graph for all customers to beserviced the next day and put with the invoice.
7. Following the guidelines and timeline set forth in the monthly Baiting Renewal Processing Calendar, cancel baiting customers in Prolinx.

4. *Accounts Receivable Collections*
    1. Assist Office Manager in monitoring and collecting customer account balances in accordance with Policy and Procedures #701, Pest Prevention Collection; #802, Termite Collection; #806, Annual Renewal Collection and #901, Lawn Collection. Spend at least one hour daily on collections.

5. *Other Responsibilities*
    1. Gather information on all claims as requested by the General Manager or Office Manager.
    2. Reconcile termite files in accordance with the Termite and Baiting Renewal Processing Calendar.
    3. Type guarantees, file customer information and print invoices as needed.
    4. All other duties as assigned.

Minimum Qualifications: Education, Experience, and/or Training

1. **Education**
    - High School Diploma or GED required.

2. **Experience**
    - Previous customer service experience preferred.
3. **Skills**
    - Strong organizational and communication skills required. Knowledge of MS Office software and typing of 45 wpm preferred.

THIS DESCRIPTION MAY NOT BE ALL INCLUSIVE AND TEAM MEMBERS ARE EXPECTED TO PERFORM ALL OTHER DUTIES AS ASSIGNED AND DIRECTED BY MANAGEMENT. JOB DESCRIPTIONS AND DUTIES MAY BE MODIFIED WHENEVER DEEMED APPROPRIATE BY MANAGEMENT.

My signature below is acknowledgement that I have read and understand the job functions and duties of this position as outlined in the job description.

Team Member’s Name (Print) _____ Date_____

Team Member’s Signature_____ Date_____

Manager’s Signature_____ Date_____

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