Letter of Expectations

**To: Commercial Service Manager**

**From: General Manager**

**Subject: 20XX Role Description, Training & Incentives Plan**

20XX is a crucial year for ABC with respect to change, and the importance of your position in the company.

Customer Service is always at the forefront in our company values.

The customer service function must be a leading practitioner of “Better Practices” that make the department the model for “Service” in the market place not just HVAC/Plumbing.

Simultaneously, we have the need as a company to enact changes that are difficult and require both understanding, and behavioral changes.

This position’s compensation, expectations, goals and implementation plan is enclosed.

You have an opportunity to earn well, perhaps better than ever before. It will be based on the performance of the department. You are the leader of the department.

You will be responsible for all Customer Service Functions including the call center.

It will require skills, leadership, and deft communication. It will be a challenge. It will be frustrating at times. It requires change. We believe you are up to this challenge and the right person to lead the changes!

You need to understand the Key performance Indicators for your department and you need to drive the processes that support these KPI’s aggressively.

The challenge is large and will not be easy, yet it is attainable and can be both gratifying and profitable.

Please review the compensation and the Key Performance Indicators, as well as what the company feels is the critical success factors for 20XX and give us your input.

GM

20XX Customer Service Manager Incentive Program

* **Base Salary of $ XX paid weekly.**
* **Standard Company Benefit Program.**
* **Bonus Program**
* When Gross Sales of Service reach or exceed ($ 800,000) and gross profit dollars reach ($ 400,000) the manager will be at target. This is a target of (50%) gross margin percentage on sales. A bonus of (5%) of all incremental margin dollars will be paid over ($ 400,000) so long as the margin percentage remains above (50%). In short, each $100,000 in service equals $2500 bonus.
* **Key Performance Measures for Operations Manager Review:**
  + Customer Service Rating 9.0 or Better
  + The call center operation meeting its KPI’s Call counts

Appointments set

Follow-up calls-in/out

* + Daily Technician Reporting Compliance Daily tracker
  + Happy Call Completion 90% or better
  + Surveys on non-closed Sales 100%
  + Circle of Six Criss-Cross Mailers 100%
  + Equipment Birthday Cards Mailed 100%
  + Referral Marketing Plan 100%
  + Company Lead Tracking reporting System 100%
  + Company Web Site updated 100%
  + Customer Satisfaction Review and Updates 100%

The critical success factors for the Customer service department of ABC in 20XX are:

1. The comprehensive management of the call center operation, insuring staff are well.
2. Trained and appointments are set, and confirmed.
3. The training of CSR’s/Dispatchers to maintain skills levels.
4. Continual work with service mgt. for training of the service technicians on customer service, opportunity selling.
5. Maintaining a strong referral program.
6. Maintaining a customer satisfaction level of 9.0 or higher. Raising ANY concerns to the managerial meeting level on customer perceptions.
7. Determining why customers did NOT buy from the company?
8. Creating customers for life for the company.
9. Developing additional maintenance (USA) sales to reach target of 10,000,000 USA’s.

Customer Service Department Business Implementation for 20XX

1. Call center operations
2. Scheduling of all calls.
3. Outbound appointment targets set and met daily – plumbing.
4. Supporting the service management function in communication.
5. Training of technicians
6. Working with Service Manager of Technical Training Calendar.
7. Customer Relations Processes followed and executed.
8. Dispatching system put in place that organizes around KPI’s and profitability.
9. Weekly review of Customer Service financial metrics.
10. Use of proper forms and paperwork to manage Customer Service department.
11. The USA maintenance business process to market and establish service agreements.
12. Reporting - Implement technician tracking and accountability.
13. Establish goal boards and maintain weekly tracking.
14. Referrals and cross marketing - Be certain each AOR job installed is included a USA and logged into criss-cross file for mailings, and a birthday card for equipment.

CUSTOMER Service Manager Expectations:

1. **Company Values and Philosophy**
2. Adhere to and exemplify the Company’s stated core values and beliefs.
3. Promote the company and the brand wherever possible.
4. Conduct operations of sales department within the framework of the law and the ethics of good business practices.
5. Exercise good judgment in all areas where the company’s interests are represented.
6. Work with a team first, individual second philosophy.
7. Come to work each and every day dressed with a positive mental approach.
8. **Leadership Expectations**
9. Set the tone for the customer service department by living the company core values.
10. Set clear, concise expectations for all department personnel.
11. Provide feedback on a regular basis to all department employees.
12. Keep the department neat, clean and organized.
13. Lead the department effort to create a safe learning environment.
14. Develop key personnel in the department to prepare them for future opportunity.
15. Implement training and skill development programs as directed by the GM.
16. Produce & track employee performance based on specific KPI’s.
17. **Customer Service Expectations**
18. Assure 100% customer satisfaction.
19. Exceed customer’s expectations for quality and value.
20. Handle and resolve all customer complaints within 24 hours, or within policies.
21. Insure that the phone is answered within three rings at all times.
22. Return all calls within 2 hours, not to pass same day.
23. Communicate with GM on a regular and routine basis to resolve questions, concerns, or issues.
24. **Customer Service Department Performance**
25. Meet or exceed all assigned financial goals and budgets.
26. Implement all company better practices that apply within the department in a timely manner.
27. Manage the customer service department to meet or exceed the dept. KPI’s.
28. Hire/Identify a successor to the CSM role. Provide training and mentor individual to become a CSM candidate.
29. Participate in regular meetings and functions to develop a team.
30. Develop departmental goals that align with company goals each year.
31. Gain thorough and complete understanding of how department performance impacts the company financial and KPI results.
32. **Communications, Reporting and Compliance**
33. CSM will report all relevant information, reports and data to the GM as required.
34. CSM will insure department compliance with all local, state, and federal codes.
35. CSM will immediately report any relevant issue regarding safety, compliance, or legal directly to the GM.
36. CSM will participate in Company meetings, hold regular department meetings and participate in company planning
37. **Reviews, Feedback and Personnel**
38. CSM will conduct performance reviews with all department personnel as directed by GM – quarterly reviews.
39. CSM is responsible for providing constant positive coaching and feedback to team members – daily and weekly service meeting for weeks review.
40. The CSM will work with the GM to define training needs within the department.
41. **Skill Development (See last page)**
42. CSM will identify areas needing and provide resources to insure proper skill development in the service department.
43. CSM will provide routine and ongoing training (technical, customer service, time management, etc.) for all technicians and personnel.
44. CSM will work with GM to develop a set of personal development goals.

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Role Description

**Title: Customer Service Manager**

**Reports To: President/General Manager**

**Location: Field Operations**

**FSLA Status: Exempt**

**Scope of Role:**

The position of Customer Service Manager reports to the General Manager. The role of Customer Service Manager is to plan, direct and control the functions of the customer service department, with direction and leadership from the GM. The Customer Service Manager is responsible for leadership, management, and performance in the overall company customer perceptions.

Functional Areas of Accountability:

1. Customer development and satisfaction. To grow and meet goals.
2. Leadership within the department. Supporting the company core values and goals.
3. All planning, preparation and execution to meet performance goals of the department.
4. The execution of the operational functions in the department, primarily call center, dispatching, training, fleet image, safety, customer service, training, service agreements, tracking of goals, and image.
5. Communication within the department, supporting the company mission, goals, and strategies.
6. Development of an annual marketing plan, internal promotions, employee incentive contests, goal tracking, and lead generation program.
7. The use of cost effective and approved technology to improve performance within the department.
8. Skill development and training of department personnel.
9. Any other functional responsibility as directed by the GM.

General Responsibilities

1. **Growth of Customer development and satisfaction**
2. Exceeding all customers’ expectations for services provided.
3. Satisfactory solutions to customer needs, concerns, and issues within the guidelines from the GM.
4. Focus on developing long-term customer relationships to insure long-term growth.
5. Implement and improve customer service department systems that focus on and enhance customer service and profitability.
6. Implement quality control practices as directed by GM, insure CSD performance to customer service KPI’s.
7. **Leadership- establishing a vital, healthy and growth oriented work environment.**
8. CSM must communicate the operating plan within the SD. Employees must understand their role in supporting the company plan.
9. CSM must lead by example and manage by continuously training core values established by the GM.
10. Create an environment for all employees that will be open, honest, team oriented, healthy, and vital.
11. CSM will develop the team and identify candidates for promotion within the department.
12. CSM is responsible for arranging and providing training (internal and external) to all department personnel.
13. **Planning and preparation to meet performance criteria.**
14. Follow company operating plan developed by GM.
15. In conjunction with GM, develop yearly budget and operating plan, and execution of the business process plan.
16. Train all employees on KPI and other performance criteria.
17. **CSM is responsible for execution of the CSM operating plan.**
18. Develop and execute CSM plan to meet performance goals.
19. Implement and manage based on KPI’s.
20. Implement organizational development program.
21. Develop and implement an operational plan with the GM, which supports total company sales goals, quality processes, and service systems to meet KPI’s.
22. The CSM will direct the daily activities of dispatch, maintenance, & customer service.
23. **Communications with CSM employees in a timely and accurate manner.**
24. Conduct performance review and feedback sessions with CSM co-workers as directed by GM – quarterly.
25. CSM to hold regular meetings with company personnel to update and facilitate performance knowledge within the department.
26. Communicate routinely with GM regarding company performance, results, and needs.
27. **Development of an annual marketing plan, internal promotions, employee incentive contests, goal tracking, and lead generation program.**
28. Demand service and service agreement marketing plan to generate revenues and new agreements.
29. Tracking of individual technician productivity and results.
30. Goal boards for departmental evaluation.
31. Responsible for lead generation based on the company lead plan.
32. Internal employee incentives, service contests, and employee promotions to create leads, and fun and rewarding work environment.
33. **The use of cost effective and approved technology to improve performance within the department.**
34. Evaluate and implement new, and productive technological innovations to improve technician productivity.
35. **SM is responsible for training and skill development within the SD.**
36. SM will schedule and conduct routine training sessions in the areas of customer service, sales skills, time management, technical competency, cross train personnel, company better practices, and any other area as directed by the GM.
37. SM will coordinate additional product knowledge/special programs training through vendor relationships.
38. Conduct interdepartmental training and cross train service technicians in lead generation, accessory sales, etc.
39. **Any other functional responsibility as directed by the General Manager.**

Training Plan for Customer Service Manager

* Company Core Values
* Sales Training for Commercial Maintenance Agreements
* Communication Skills
* Company Operational Software Usage
* Vendor Products Classes
* EXCEL, WORD – minimum intermediate usage.