Letter of Expectations

**To: Customer Service Representative**

**From: Service Manager & General Manager**

**Subject: 20XX Expectations, Role and Compensation Plan**

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

As with previous years, Service and maintenance take the forefront once again in 20XX.

Your position title is “Customer Service Representative”.

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

The plan is different than what you may have been used to in the past. 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 your functional area. It will require specific 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.

**Service Manager/General Manager**

The Year Plan:

**Your key success factors for the Customer Service department of ABC in 20XX are:**

1. Scheduling of all maintenance agreement and tune-ups on a timely basis.
2. Answering the main phones within 3 rings.
3. Making outbound customer service follow-up calls.
4. Explaining the USA club membership to our customer base.
5. Maintaining tracking discipline and goal boards – update them daily.
6. Champion the renewal efforts of all USA Club agreements.
7. Support the follow-up calls of any direct marketing done by the company.
8. Cross train with CSR function – to support the service/maintenance team.
9. Communicating with customers any specials.
10. Debriefing technicians on service calls when necessary.
11. Driving accessory sales of identified products on truck stock (humidifiers, air cleaners, UV lights, CO Detection, and Thermostats).

CSR 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 personnel who report to you.
11. Keep the CSR department neat, clean and organized, the same for your desk area.
12. Lead the department effort to create a safe learning environment.
13. Implement training and skill development programs as directed by the Service Manager.
14. **Customer Service Expectations**
15. Assure 100% customer satisfaction.
16. Exceed customer’s expectations for quality and value.
17. Handle and resolve all customer complaints within 24 hours, or within policies.
18. Insure that the phone is answered within three rings at all times.
19. Return all calls within same day.
20. Communicate with SM on a regular and routine basis to resolve questions, concerns, or issues.
21. **Customer Service Performance**
22. Meet or exceed all assigned goals.
23. Implement all company better practices that apply within the department in a timely manner.
24. Manage the CSR function - department to meet or exceed the company KPI’s.
25. **Communications, Reporting and Compliance**
26. CSR will report all relevant information, reports and data to the SM as required.
27. CSR will immediately report any relevant issue regarding safety, compliance, or legal directly to the SM.
28. CSR will participate in company meetings, hold regular sales department meetings and participate in company planning
29. **Reviews, Feedback and Personnel**
30. CSR will have performance reviews with manager quarterly.
31. CSR is responsible for providing constant positive coaching and feedback to team members – daily and weekly service meeting for weeks review.
32. The CSR will work with the SM to define training needs within the department.
33. **Skill Development (See last page)**
34. CSR will identify areas needing and provide resources to insure proper skill development in the service department.
35. Computer skills are required
36. Phone skills and interpersonal skills are required – interpersonal at a high level
37. CSR will work with SM to develop a set of personal development goals.

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

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

20XX CSR Incentive Program

* Base Salary of $ XX paid weekly, or Hourly Pay of $ XX per hour
* Standard Company Benefit Program
* The Total Company Profit Sharing Program
* Bonus Program:
* When Gross Sales of Service/Maintenance together reach or exceed $ xxx,000 and gross profit dollars reach $ xxx,000 the department will be at target. This is a target of 60% gross margin percentage on sales. A bonus of 10% of all incremental profit dollars will be paid over $ xxx,000 and shared among the employees in service administration so long as the margin percentage remains above 60%. This bonus is paid quarterly.
* When the department reaches xxx USA service agreements, a one-time bonus of $ 1000. At xxx USA’s will be paid.
* Key Performance Measures for CSR Quarterly Reviews:
* # of USA Service Agreements Sold xx in 2025
* % of Renewals of Service Agreements Sold 85% in 2025
* Completion of Personal Training Program 100%
* Customer satisfaction rating 9.0 or higher

Employee Signature: Manager Signature:

Date: Date:

Role Description

**Title: Service CSR**

**Reports To: Service Manager**

**Location: Field Operations**

**FSLA Status: Exempt**

**Scope of Role:**

The role of the CSR is to insure all customers are well communicated and informed about the company. Your goal is complete satisfaction.

You are empowered to make the customer happy and fulfilled, and in fact are expected to do so.

**Work Hours:**

7:00am to 4:00pm shift 1- Monday through Friday

10:00am to 7:00pm shift 2- Tuesday through Friday, Saturday 7:00 AM – 11:00AM

Functional Areas of Accountability:

**Daily Duties:**

1. Respond to all messages left overnight.
2. Schedule and coordinate all maintenance calls as calls are received.
3. Maintain the CSR tracking board and filing system.
4. Maintain the Maintenance Agreements, including billing, scheduling, database information, customer hard files and renewals.
5. Help Service Manager with marketing issues as directed.
6. Update customer files as information is received from installation. (Extended Warranties, equipment info, new customers, Birthday tickle file, etc.)
7. Type service agreement proposals for new customers.
8. Maintain customer history files in database.
9. If needed, file work orders.
10. Maintain a system for CSR procedures, scripts, and training of any new CSR personnel.

Performance Measurements:

1. Attitude and demeanor with customers (Subjective) and as rated by customer debrief and hidden shopping audits.
2. 85% first time call completion ratio.
3. Review each invoice for service manager for accuracy and note exceptions if any.
4. Maintaining the weekly tracking board system by technician
5. Number of customer complaints due to scheduling.
6. Number of return trips/call backs due to scheduling inefficiencies.
7. 100% Accuracy of customer history files.
8. 100% Accuracy of customer Maintenance Agreement files.
9. Timeliness of billing information to accounting.

**Personal Skill Development Plan:**

As noted by manager and employee for the year

Training Plan for Service Manager

* Telephone selling skills
* Personality training and skills
* EXCEL – Basic Spread Sheet
* EXCEL – Intermediate
* Successware
* Software Training – based on choice
* Financial Training – Learning the P&L and how it relates to service