

Educaid's Key Performance Areas emphasize the individual initiative shown by CSRs. The Performance Development Meeting form is filled out by CSRs prior to their monthly performance meetings, and helps them lead the meetings.

— Editor
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Key Performance Areas Customer Service Representatives

Summary of Primary Areas of Responsibility

- ❑ Handle all incoming borrower calls for all products and services offered by company, meeting company and individual standards for service levels, customer service and quality.
- ❑ Provide fast and accurate responses to customer email and mail requests.

Communication

- ❑ Keep an open line of communication with your supervisor and keep them informed on any activities and/or issues as they arise.
- ❑ Keep an open mind to change and accept change as a positive step in the right direction.
- ❑ Be fully prepared for monthly PDMs.
- ❑ Strive for accuracy and quality in your written and verbal communications.
- ❑ When communicating, always seek first to understand, then to be understood.
- ❑ Ask for help when you need it and volunteer to help co-workers when they require assistance.

Quality of Work-Accuracy, Speed, Risk Reduction

- ❑ Pay fantastic attention to detail. Notice when things don't look right. Seek out resources to get it fixed. Take the time to notify your supervisor of any trends or issues.
- ❑ Meet daily service goals for all customer service activities.
- ❑ If your work requires a new procedure or a change in existing procedure, take the initiative to create a new procedure update the existing written procedure within 10 days of the change.
- ❑ Work as a team to keep each other informed and mentor new employees. Cross train back ups for all personal duties.
- ❑ Share ideas that would streamline or improve existing processes. Everyone's input is valuable.

Resource Management

- ❑ Regular communication with team on aspects of their jobs you can assist with.
- ❑ Provide first call resolution and ownership of customer issues from start to finish. Prevent callbacks.
- ❑ Assist the team to reduce or eliminate backlogged projects.
- ❑ Complete all assignments and job responsibilities within required timelines.

Drive and Initiative

- ❑ Adhere to work schedules and be adaptable to changes in schedule due to training, meetings or absences. Take breaks and lunches on time.
- ❑ Actively develop leadership skills.
- ❑ Walk the talk. Do what you say you will do and do what is right. Keep promises and strive for excellence.

Attitude

- ❑ Display a positive attitude to both internal and external customers and co-workers.
- ❑ A spirit of teamwork is essential to the department's success.
- ❑ Be involved and interested in the business and in the duties of other teams. Know how Customer Service can fit in and assist.
- ❑ Be solutions oriented. Look for "win-win" situations and ways to say yes whenever possible. Encourage others to do the same.
- ❑ Set a positive example and promote the company as being the best in the business.
- ❑ Make decisions in the best interest of your customer.
- ❑ Be open to the suggestions of management in the areas of improvement and personal growth. Accept feedback as a positive step towards being the best in the industry.

Standards

- Maintain a daily adherence of ____ or better.
- Strive for an average talk time of _____.
- Track all customer calls.
- Answer rep average number of calls per week.
- Logon time must be at or above standards.
- Individual customer satisfaction scores of 6.0 or higher (on 7 point scale).

Performance Development Meeting - 2003 Review Form

Name	Date

*Please provide feedback related to each of your KPA's in the table below

Current Situation	Desired Situation	Changes/Action Steps
▪	✓	✓
▪	✓	✓
▪	✓	✓
▪	✓	✓
▪	✓	✓
▪	✓	✓

What do I need from my manager/supervisor?:

Other Comments: