

**CUSTOMER SERVICE REPRESENTATIVE
(Time-Based)**

APPENDIX A

O*NET CODE 43-4051.00

This training outline is a minimum standard for Work Processes and Related Instruction. Changes in technology and regulations may result in the need for additional on-the-job or classroom training.

Alternative Customer Service job titles: Call Center Representatives, Customer Care Representatives, Customer Service Agent, Guest Service Representative, Customer Support Representative, Client Services Representative, Account Representative and Member Services Representative.

WORK PROCESSES

	Approximate Hours
A. Workplace Orientation	100
1. Maintain compliance with all standards of the workplace.	
2. Describe workplace organizational structure.	
3. Understand and apply workplace policies, rules, regulations, and procedures.	
4. Demonstrate proper use of workplace equipment and resources, as appropriate.	
5. Learn and employ the protocols and practices for managing workplace helpdesk, call center, etc.	
6. Understand and follow proper opening and closing procedures when arriving and departing from workstations or work areas, etc.	
B. Interpersonal Relationships	200
1. Learn to effectively handle difficult conversations while maintaining a calm and professional demeanor.	
2. Understand how to compromise, and resolve conflicts, in a respectful manner.	
3. Learn to work both independently and in a group setting, with multiple distractions.	
4. Understand how to communicate with supervisors, co-workers, and customers in a professional and courteous manner.	

5. Demonstrate effective communication and critical reasoning skills through answering inquiries and resolving problems, in person and in writing.
6. Participate in training sessions and team building activities, as appropriate.

C. Administrative Support

300

1. Become familiar with workplace automated systems, and computer, software, and database applications.
2. Learn and employ the protocols and practices for managing workplace helpdesk, call center, etc.
3. Perform various clerical duties (enter information into databases; process forms, letters, invoices, customer account information, etc.).
4. Demonstrate ability to retrieve or research information from various sources as requested.

D. Customer Support

500

1. Understand the different types of Customer Service settings (e.g., retail stores, call centers, etc.).
2. Learn how to respond to customer requests for information (products, services, and orders).
3. Connect with clients through email, telephone, or in person.
4. Practice active listening and complex problem-solving when handling customer inquiries and to determine the needs of the client based on the information given.
5. Provide notification to customers regarding services and product information.
6. Learn to troubleshoot complications that arise and offer a resolution.
7. Engage with customers to resolve issues and determine their needs and refer them to appropriate departments or areas as needed.
8. Respond to customer complaints or concerns in a professional manner.
9. Demonstrate ability to take initiative, make decisions, and discern when a supervisor is needed.
10. Refer unresolved customer questions or concerns to onsite supervisor for further assistance.

E. Knowledge of Products & Services **400**

1. Acquire a strong understanding of workplace products and services to address customer questions.
2. Provide information on routine inquiries about products and services.
3. Engage with customers to provide product and service information and resolve problems and issues, when appropriate.
4. Present knowledge and information about other products and services and identify new information as needed.
5. Follow appropriate procedures when taking customer orders (or processing returns) and ensure all forms and documents are complete and accurate (if applicable).
6. Learn to maintain merchandise and supply areas as required.
7. Direct customers to supervisors or appropriate resource areas, if applicable.
8. Acquire knowledge of product, service, and billing processes and reports.
9. Understand and learn how to prepare product invoices.

F. Project Planning **250**

1. Learn and employ time-management methods in prioritizing tasks and assignments.
2. Coordinate with internal teams to monitor project timelines, deliverables, work hours, budgets, and expenditures, etc.
3. Demonstrate an understanding of how to effectively manage projects with internal teams.
4. Understand how to follow objectives and learn to utilize project planners to ensure timelines are accurate and deadlines are met.
5. Monitor the quality of work from internal teams to ensure goals are met.

G. Data Comprehension and Communication **250**

1. Interpret and analyze information using the workplace database.
2. Input new information into databases based on customer conversations.
3. Create customized reports for customers based on personal information collected.

4. Communicate changes in customers' profiles based on changes in workplace policy or procedures.
5. Open, close, process, and maintain customer accounts by recording accurate, valid, and completed account information using the tools provided.
6. Become familiar with utilizing interpreter services to assist customers, when applicable.
7. Understand the procedures for processing and maintaining confidentiality of all customers and workplace.

TOTAL HOURS: 2000

Apprenticeship work processes are applicable only to training curricula for apprentices in approved programs. Apprenticeship work processes have no impact on classification determinations under Article 8 or 9 of the Labor Law. For guidance regarding classification for purposes of Article 8 or 9 of the Labor Law, please refer to <https://dol.ny.gov/public-work-and-prevailing-wage>

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APPENDIX B

RELATED INSTRUCTION

Workplace and Safety

1. Basic Workplace Safety and Workplace Policies
2. Knowledge of Applicable Local, State, and Federal Guidelines
3. Sexual Harassment Prevention Training – must comply with section 201-g of the Labor Law

Job Skills and Theory

1. Computer Literacy
2. Business Productivity Software (e.g., Microsoft Office suite)
3. English Composition
4. Basic Arithmetic
5. Customer Service Skills
6. Oral and Written Communication Skills
7. Public Speaking
8. Business Communications
9. Data Analysis
10. Spreadsheets
11. Databases
12. Business Management Strategies
13. Business Ethics
14. Independent and Collaborative Working
15. Project Management
16. Problem Solving
17. Evaluating Risks
18. Active Listening

A minimum of 144 hours of Related Instruction is required for each Apprentice each year.

Appendix B topics are approved by New York State Education Department.