

# DACUM Research Chart for Customer Service Representative

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C O L L E G E



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# DACUM Research Chart for Customer Service Representative

<b>Duties</b>		<b>Tasks</b>				
<b>A</b>	<b>Respond to Inbound Communication</b>	A-1 Gather customer information (e.g., call, e-mail, fax, mail)		A-2 Determine response procedure	A-3 Provide services and information	A-4 Address Financial Issues (e.g., billing, credit, rebate)
<b>B</b>	<b>Initiate Outbound Communication</b>	B-1 Prepare outgoing resources	B-2 Establish customer communication	B-3 Offer products, services, or information	B-4 Obtain transaction information	B-5 Verify transaction information
<b>C</b>	<b>Maintain Customer Data</b>	C-1 Create customer records	C-2 Modify customer records	C-3 Clarify inaccurate data	C-4 Document customer interaction	C-5 Remove invalid records
<b>D</b>	<b>Interact With Other Parties</b>	D-1 Submit internal action request	D-2 Transmit external action request	D-3 Exchange account information	D-4 Distribute customer / product feedback	D-5 Obtain authorization / verification / information
<b>E</b>	<b>Continue Professional Development</b>	E-1 Create development plan	E-2 Participate in performance review	E-3 Attend in-service training	E-4 Partake in special assignments (e.g., mentoring, training co-workers)	

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A-5 Handle customer complaints	A-6 Offer additional services (e.g., referral, up-sell, cross-sell)	A-7 Verify action with customer	A-8 Complete follow-up activities (e.g., call back, documentation)			
B-6 Process transaction						
D-6 Acquire policy / program / product changes						
E-5 Maintain license requirements * some fields						

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### **General Knowledge and Skills**

Multi-lingual computer skills/phone skills	Ability to understand customer needs
Organizational skills/prioritize	Provide quality service
Problem solving skills	Balance company vs. customer
Ability to multi-task	Motivational skills
Listening skills	Proofreading/clerical
Communication skills	Math knowledge
Knowledge of product/policies & procedures	Type/keyboard
	Analytical

### **Tools, Equipment, Supplies and Materials**

Headphones/foamies	Reference books – software
Computer/printer	Chair(s)
Telephone/voice mail	Workstation
Fax machine	Copy machine/scanner
Writing supplies/office supplies	Alcohol wipes
File Cabinet	Internet access/e-mail
Forms	Internet reference

### **Worker Behaviors**

Complete tasks in a timely fashion	Diligent
Work well under pressure	Professional
Team Player	Customer service oriented
Works well with others	Adaptable
Responsible	Rapport
Flexible	Ability to see big picture
Punctual	Sincere desire to help
Efficient	Attention to detail
Polite	Good judgment
Accountability	Takes pride
Handle changes well	Doesn't take things personally

### **Future Trends and Concerns**

Internet friendly	Better understanding of equipment hardware
More imaging of documents	More DACUM-linking programmers with users
Retrieve on computer	Need for "better" computer equipment-faster, etc.
Software – Word, Microsoft Windows	Need for improved telephone system equipment
Web Services – e-businesses	
Proficient in e-mail	
Know e-mail etiquette	
Improving written skills in line with greater e-mail usage	