

## OJT CORE COMPETENCIES

# Customer Service Representative

### TERM OF APPRENTICESHIP

The term of the apprenticeship is 2 years.

### APPRENTICESHIP APPROACH

Time-based

Competency-based

Hybrid

*Apprenticeships may be time-based, requiring a set number of OJT (on-the-job training) and RTI (related technical instruction) hours; competency-based, allowing completion once all skills are mastered; or hybrid, blending both time and competency requirements.*

### SCHEDULE AND CHECKLIST

Essential Job Categories	Competencies
Discuss goods or services information with customers or patrons	Confer with customers by telephone or in person to provide information about products or services, take or enter orders, cancel accounts, or obtain details of complaints.
Maintain financial or account records	Keep records of customer interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken.
Provide notifications to customers or patrons	Contact customers to respond to inquiries or to notify them of claim investigation results or any planned adjustments.
Calculate cost of goods or services	Determine charges for services requested, collect deposits or payments, or arrange for billing.
Collect deposits, payments or fees	Determine charges for services requested, collect deposits or payments, or arrange for billing.
Respond to customer problems or complaints	<ul style="list-style-type: none"><li>• Check to ensure that appropriate changes are made to resolve customers' problems.</li><li>• Resolve customers' service or billing complaints by performing activities such as exchanging merchandise, refunding money, or adjusting bills.</li></ul>

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Essential Job Categories	Competencies
Respond to customer problems or complaints	<ul style="list-style-type: none"><li>Obtain and examine all relevant information to assess validity of complaints and to determine possible causes, such as extreme weather conditions that could increase utility bills.</li></ul>
Execute sales or other financial transactions	Resolve customers' service or billing complaints by performing activities such as exchanging merchandise, refunding money, or adjusting bills.
Prepare documentation for contracts, transactions, or regulatory compliance	Complete contract forms, prepare change of address records, or issue service discontinuance orders, using computers.
Refer customers to appropriate personnel	Refer unresolved customer grievances to designated departments for further investigation.
Review customer insurance information	Review insurance policy terms to determine whether a particular loss is covered by insurance.
Promote products, services, or programs	Solicit sales of new or additional services or products.
Process customer bills or payments	Compare disputed merchandise with original requisitions and information from invoices and prepare invoices for returned goods.
Verify accuracy of financial or transactional data	Compare disputed merchandise with original requisitions and information from invoices and prepare invoices for returned goods.

OJT CORE COMPETENCIES

# Customer Service Representative

## SCHEDULE AND CHECKLIST

### Essential Job Categories

Recommend packing or shipping methods

### Competencies

Recommend improvements in products, packaging, shipping, service, or billing methods and procedures to prevent future problems.



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