

**COMPETENCY MODEL FOR
CUSTOMER SERVICE SPECIALIST
CLASS CODE 1229**

The following competencies have been identified as those that best separate superior from satisfactory job performance in the class of **CUSTOMER SERVICE SPECIALIST** (Numbers refers to the order of competencies in the Competency Bank.)

- 3. Judgment and Decision Making
- 6. Attention to Detail
- 2. Mathematics
- 20. Job Knowledge
- 34. Customer Service
- 43. Follow Oral Directions
- 44. Follow Written Directions
- 45. Oral Communication

On the following pages are descriptions of each competency, including a definition, the level of the competency required for the class (*italicized, bolded, and underlined*), examples of behavioral indicators, and satisfactory and superior performance levels.

3. MATHEMATICS -

Performs arithmetic or higher-level mathematical computations accurately.

Level of Competency Required by Job:

- Level 1: **Perform arithmetic computations (add, subtract, multiply, divide, ratios, percentages).**
- Level 2: Use algebra (substitute numbers for letters in a formula), geometry (angles, distances, area), and/or descriptive statistics (mean/median/mode, standard deviation, range).
- Level 3: Apply and interpret calculus, inferential statistics (t-tests, correlations, ANOVA, multiple regression) or other very high level mathematics.

Examples of Behavioral Indicators:

- Quickly and accurately performs arithmetic computations.
- Appropriately selects and applies formulas for stated purpose.
- Correctly identifies an appropriate analysis for a specific purpose and selects the appropriate computer program for computation.
- Accurately interprets and presents results of mathematical/statistical computations.

Performance Levels:

Satisfactory

Knows mathematical requirements of the job and performs them correctly. Verifies work to ensure accuracy.

Superior

Identifies additional opportunities for the application of mathematics in work. Answers questions/trains others to assist them in their use of mathematics.

- 4. JUDGEMENT AND DECISION MAKING-** Accurately assesses situations, seeks new information if necessary, and applies all available information to reach sound conclusions/formulate effective response.

Level of Competency Required by Job:

- Level 1: **Training and guidelines needed to respond to immediate situations within very specific function are provided (or supervisor available to assist).**
- Level 2: General information and guidance to assist in responding to a variety of situations across a range of circumstances are provided.
- Level 3: Little guidance available for responding to a wide range of complex situations with far-reaching and/or enduring consequences.

Examples of Behavioral Indicators:

- Effectively responds to atypical situations.
- Asks questions or otherwise obtains additional relevant information to make a decision.
- Formulates a decision and necessary actions based on available facts.
- Correctly infers appropriate response based on information provided and existing policies, personal experience, and/or consultation with others.
- Discusses conclusions/possible responses with others before taking action as necessary.
- Considers impact of decisions on all affected parties.

Performance Levels:

Satisfactory

Correctly assesses routine and unusual situations and reaches appropriate conclusions for actions needed. Obtains additional information and/or consults with others as necessary.

Superior

Evaluates new situations accurately to establish an appropriate response or plan of action. Recognizes the impact on all affected parties, as well as the possible ramifications and/or repercussions of setting a precedent.

6. ATTENTION TO DETAIL -

Extremely careful in addressing all aspects of each work assignment in order to produce “completed staff work” and/or avoid any negative outcomes.

Level of Competency Required by Job:

- Level 1: **Ensure all aspects of work assignment are completed as directed.**
- Level 2: Verify that each aspect of work assignment is properly completed; make logical inference regarding additional activities that may need to be performed to produce “completed staff work.”
- Level 3: Include evaluation of final work/work product in its accomplishment; make adjustments as possible to improve.

Examples of Behavioral Indicators:

- Carefully checks all aspects of work for completion and accuracy before submitting.
- Identifies errors (for example, typo’s, computations, measurements, application of laws/rules/policies) and corrects them prior to submitting.
- Cross-checks work against available resources.
- Sets up a means of checks and balances to ensure work accuracy.
- Considers changes in final work product to ensure usability by recipient.
- Completes all revisions upon request.

Performance Levels:

Satisfactory

Ensures that each task accomplished represents “completed staff work.” No remaining details/ inconsistencies for others to address.

Superior

All aspects of each task completed are verified to be correct. Identifies any foreseeable consequences of work that may need to be addressed and does so.

11. JOB KNOWLEDGE – Knows information required to perform a specific job. Includes both widely available courses of study (for example, chemistry, human resources management, graphic arts) and City-specific information (parking regulation and ticketing practices; purchasing procedures; provisions of the City Charter).

Level of Competency Required by Job:

- Level 1: **Knowledge is concrete, factual, and/or procedural and may be defined by the organization. Situations in which it is applied are quite consistent.**
- Level 2: Knowledge is substantive and may be defined by an external trade, field, or profession. Situations in which it is applied vary and, as such, require breadth and depth of understanding.
- Level 3: Knowledge is abstract, conceptual, and/or complex and may be supported by a well-defined academic discipline or authoritative sources (e.g., laws, ordinances, government guidelines/regulations/codes). Situations in which it is applied may vary greatly or be novel.

Examples of Behavioral Indicators:

- Performs work correctly/avoids technical (job content related) errors.
- Answers technical questions about work accurately.
- Asks few technical questions about the performance of routine work activities.
- Offers advice (“coaching”) to new employees regarding their work.
- Develops training programs for other employees.
- Sought out as a source of information by others.

Performance Levels:

Satisfactory

Sufficient job knowledge to perform work correctly independently. Answers technical questions about work correctly.

Superior

Expertise in technical job information sufficient to serve as a resource to others. May develop training manuals/ programs and/or give internal and/or external presentations related to work.

JOB KNOWLEDGE AREAS

1. Knowledge of Office of Finance forms and procedures such as business tax applications, updating forms, police fire and tobacco applications, refund forms, and penalty waiver forms, sufficient to comprehend the information and complete customer service requests via phone, email, online chat/video, and in person.
2. Knowledge of business and user tax information and permits sufficient to work independently, adequately read and comprehend the information, and convey information orally, in writing, via email, in person and virtually to customers.
3. Knowledge of desktop computer software and office equipment such as Microsoft Suite, Google Suite, LATAX, TDS, Front, VCC, and Crystal Reports sufficient to enter, retrieve, and update information received from tax payers such as new applications, gross receipts, information updates, money received, and information from other agencies regarding pertinent tax and income information.
4. Knowledge of applicable City ordinances pertaining to City business and user tax and associated permits sufficient to comprehend the information and explain it to customers and respond to direct inquiries.
5. Knowledge of City policies and procedures, rules, regulations and ordinances related to City business taxes sufficient to comprehend the information, convey it, and clearly write and prepare correspondence such as emails, letters, chats, and facsimile to the public or other City employees.

34. CUSTOMER SERVICE–

Interacts with recipients of services (internal or external customers) in a way that provides accurate, timely, and effective information and service.

Level of Competency Required by Job:

- Level 1: **Interact with customers in person, over the telephone, or through email (and/or other electronic media) in order to provide information or assistance. Listen to customer concerns; explain/reconcile information and provide alternatives if possible; facilitate resolution by making referral and/or following-up as necessary.**
- Level 2: Promotes positive customer service. Serves as a model of providing exemplary customer service.
- Level 3: Develop customer-oriented procedures; identifies changes in procedures to enhance customer service and ensures they are implemented.

Examples of Behavioral Indicators:

- Carefully listens to (or reads) customer statement of the issue.
- Provides direct, informative, accurate responses to customer.
- Suggests options if available.
- Maintains a positive attitude in the face of customer complaint or frustration.
- Remains focused on the issue presented by the customer and directs the customer back to the issue if necessary.
- Asks the customer if their concerns have been fully addressed.
- Ensures organizational policies and practices are customer-focused.
- Ensures all employees recognize their responsibility for customer service and are properly trained for it.

Performance Levels:

Satisfactory

Displays knowledge as well as courtesy and patience when interacting with customers. Ensures customers' issue is correctly identified and remains focused on it until it is resolved.

Superior

Seeks further information or advice to resolve difficult issues. Solicits feedback on the effectiveness of service. Makes suggestions for improving service and facilitates changes needed to implement.

43. FOLLOW ORAL DIRECTIONS –

Performs work accurately as directed orally.

Level of Competency Required by Job:

- Level 1: Receive specific, complete oral directions daily or by individual task assignment throughout the day.
- Level 2: **Receive general instructions orally that span across days or for entire assignments.**
- Level 3: Receive general instructions/assignments orally regarding long-term objectives/responsibilities.

Examples of Behavioral Indicators:

- Does work assigned orally properly and on time.
- Asks pertinent questions for clarification of assignments.
- Performs work correctly when instructions were given orally.
- Explains assignments to others who received the same instructions.
- Performs work in accordance with general outline provided orally.
- Correctly infers details of assignments given only in general terms.

Performance Levels:

Satisfactory

Properly performs work when concrete, specific instructions are given orally. Asks pertinent questions when parts of the instructions are unclear or omitted.

Superior

Properly performs work assigned orally. Answers questions or explains work to others. Correctly infers details or portions of instructions that were omitted.

44. FOLLOW WRITTEN DIRECTIONS –

Performs work accurately as directed in writing.

Level of Competency Required by Job:

- Level 1: Perform tasks assigned in writing.
- Level 2: Perform work after reading instructional manual.
- Level 3: **Perform work after completion of training modules or programs presented in writing.**

Examples of Behavioral Indicators:

- Correctly completes work assigned in writing.
- Answers questions and/or explains work to others who received the same instructions.
- Learns and applies information presented in writing (instruction manual; training program).
- Correctly infers details of work to be performed that were unclear or omitted as presented in writing.

Performance Levels:

Satisfactory

Correctly performs work assigned or for which training was provided in writing.

Superior

Understands instructions and training materials presented in writing to the extent that is able to answer questions or explain to others. Correctly infers unclear or omitted details as presented in writing.

45. ORAL COMMUNICATION – Communicates orally in a clear, concise, and effective manner.

Level of Competency Required by Job:

- Level 1: Exchange specific, job-related information orally with others in the immediate work environment or via telephone and/or radio.
- Level 2: **Obtain/provide/present general and/or job-specific information orally to a variety of others in various situations.**
- Level 3: Obtain/provide/present a diverse array of information orally at varying levels of complexity to a wide range of others across many different situations and circumstances.

Examples of Behavioral Indicators:

- Audience clearly understands the intended message.
- Rarely must repeat information in response to questions.
- Refrains from use of unnecessary words, phrases, or jargon.
- Provides a level of detail appropriate to the situation (avoids too much or too little detail).
- Speaks at a level appropriate to the audience in terms of terminology, sentence structure, and simplicity/complexity of ideas expressed. Uses words with precision (vocabulary) to convey exact information.

Performance Levels:

Satisfactory

Speaks clearly and audibly, providing the appropriate information and level of detail. Typically conveys the message on the first attempt. Answers questions accurately and directly.

Superior

Speech is direct and to the point. Speaks convincingly and with authority when appropriate. Maintains sensitivity to the audience while providing thorough information with the appropriate level of detail through the use of precise language.

