



POSITION GUIDE

DATE: August 27, 2021

POSITION TITLE: Manager of Customer Service

FUNCTION: The position of Manager of Customer Service is responsible for customer satisfaction and retention by assuring a high-quality customer interaction with clients seeking help solving technical issues with Auto-Graphics products or training and support in their use. Duties include management of the customer service department and help desk, directing installations and implementations of Auto-Graphics products for new clients or enhancements for existing clients, overseeing customer training in person, remotely or by video, and product documentation and help systems, as well as providing Quality Assurance and sales support. The Manager of Customer Service is an exempt position and does not qualify for overtime pay under the law.

ACCOUNTABILITY: The Manager of Customer Service is accountable to the President of Auto-Graphics, or in his absence to the Board of Directors.

RESPONSIBILITIES:

MANAGEMENT

- Responsible for customer loyalty, satisfaction, and retention by managing customer loyalty programs, customer service, help desk, new client onboarding and product implementation, product training and documentation staff and functions.
 - Consistently achieves above average rankings on annual customer satisfaction survey and 95% retention on renewing accounts.
- Directs the daily activities of customer service staff. Responsible for hiring, training, compensation, discipline, termination, personal development, and department morale. Assures compensation guidelines and company HR practices are rigorously followed.
 - Staffing, product knowledge and technical skills are consistently at levels needed to meet customer service goals and metrics.
- Creates and communicates customer service goals and standards aimed at increasing loyalty, retention, and renewals. Continuously monitors results to assure goals and standards are consistently met.
 - All goals are documented in writing.
 - Weekly reporting tracks actual performance vs. goals with less than five percent variance in actual results vs. goals.
- Responsible for implementing and supervising quarterly performance management goals for customer service staff and the department.
 - Individual and department goals are submitted to President for approval at least two weeks before the beginning of each quarter.
 - Individual and department performance is consistently 90 percent or better of goals.

HELP DESK

- Directs daily help desk activities. Assures staffing levels are sufficient to handle inbound help requests via phone and email.
 - No more than four calls go to voice mail each month.
- Establishes policies and procedures for recording and tracking help tickets and assures they are followed.
 - Customer service staff are 100 percent in compliance with written policies and procedures.
- Monitors help desk activities to assure that tickets are closed according to established SLAs. Identifies and removes obstacles that may prevent tickets from being resolved on schedule.
 - 95 percent of tickets are resolved on or before SLA deadlines.
- Monitors workflow and processes for continuous improvement. Responsible for ongoing training and development of customer service staff to improve the quality of service and overall productivity.
 - As part of quarterly personal goals, identifies one workflow or process affecting customer satisfaction to investigate for improvement.
 - Proposals for improvement include cost/benefit analysis and change management and communication plan.

PRODUCT IMPLEMENTATIONS

- Directs activities of customer service staff for new client onboarding, new system implementations and customer add-ons.
 - Kick off meetings to launch new system implementations or customer add-ons consistently occur within five business days of signing of contract.
- Assigns customer service staff to work with clients on new system implementations and customer add-ons.
 - Product knowledge and technical skills of customer service staff are consistently a 100 percent match with project requirements.
 - All Customer Service staff can conduct new system implementations and add-ons without assistance from others within 90 days of date of hire.
- Inspects customer requirements documents created by customer service staff for accuracy and completeness.
 - All requirements documents accurately reflect customer expectations and features communicated in contract.
 - Where requirements differ from expectations or the contract, a change order is produced 100 percent of the time.
- Monitors progress of implementations to assure customer requirements and deadlines are being met. Intervenes to remove obstacles or barriers that threaten customer satisfaction or deadlines. Responsible for meeting project deadlines, milestones and “go live” dates.
 - Implementations occur on time or are no more than five business days late when approved by the client and A-G President.

- Is immediately notified by customer service staff when an obstacle threatens to delay implementation past deadline.
- Assures that change order policies and practices are consistently followed.
 - No work that extends beyond that agreed to in the contract is performed without a change order unless with the prior approval of the A-G President.
 - When a change order is required, client approves change order 100 percent of the time before the change order is processed.
 - Accounting staff are consistently notified of the need for a change order no later than 24 hours after client approval. Can provide accounting all the information required to accurately cost out a change order 95% of the time.
 - Informs accounting of any delays or pull forward of change orders billing dates. Monitors monthly and quarter Change Order reports to provide any updates to billing amounts or dates for change orders.
- Responsible for documenting processes and procedures for product implementation and add-ons and for training staff to perform implementations.
 - Documentation is complete, accurate, current, and easily understood by Customer Service staff.
- Assures an overall satisfactory customer experience. Intervenes directly with the customer when customer service standards are not met to restore customer satisfaction.
 - Checks in weekly with client contact during new product implementation or customer add-on for feedback on staff performance, customer satisfaction.

SHAREit Data Processing

- Assures weekly and monthly updates to client databases occur on schedule and without defect. Oversees team responsible for collecting data from clients, “scrubbing” and removing defective client data, installing updates and inspecting to assure no defects were introduced.
 - Updates to client databases routinely occur on schedule and without defect.

CUSTOMER SERVICE

- Assures that customer service staff possess the product knowledge and technical skills required to solve all help-desk related calls and emails and to perform new product and customer add-on implementations.
 - Can accurately communicate features and benefits of Auto-Graphics products and services in live, virtual, and recorded training sessions in a way that clients find easy to understand and to remember and assures Customer Service staff can do the same within 90 days of date of hire.
- Assures staff are adequately trained in “people skills” to provide an exceptional customer experience and to diffuse tense situations or manage angry clients.
 - Identifies third-party training and certification programs suitable for improving customer service skills of staff.
 - All staff received third-party training in customer service skills and managing angry clients every 12 months.

- Assures that all client interactions with customer service staff are consistently and accurately recorded in the company help desk systems and CRM.
 - Reviews client contact records with each staff member during weekly one-on-one to assure quality and offer constructive feedback.
- Routinely sits in on client meetings with customer service staff, listens in on phone calls with clients or reviews email correspondence to assess the quality of customer interactions and provides staff constructive feedback for improvement.
 - Devotes at least two hours daily evaluating staff interactions with clients and half hour for a weekly one-on-one meeting.
- Talks with each customer quarterly to assess satisfaction and solicit ideas for improvements to customer service practices.
 - Summarizes findings in a report provided to A-G President the first week of each quarter.
- Possess sufficient product knowledge and technical skills to work directly with clients as deemed necessary or desirable.
 - Takes responsibility for managing at least one new product implementation or customer add-on quarterly.
 - Takes the lead on any client project where the value of recurring annual revenue equals or exceeds \$100,000.

CUSTOMER TRAINING & HELP SYSTEM

- Directs the development user training programs and makes them available to clients on an ongoing basis via remote or onsite live training or recorded training videos.
 - On-demand library of video training is available 24/7, always up-to-date and easily available through the product.
- Assures that product documentation and helps systems are accurate and up-to-date and that clients are trained in accessing and using them.
 - All product documentation and help systems are consistently updated for new features as a routine part of the software release.

PLANNING & BUDGETING

- As a member of the executive team, participates in annual planning and budgeting, setting department goals and budgets and working with management to set company-wide goals.
 - Actively participates in annual planning meetings. Comes prepared with ideas and encourages others to share their ideas.
 - Accurately estimates annual expenses for staffing, equipment, software, training, supplies, etc. Contributes budget on schedule. Actual expenses vary from estimates by five percent or less.
- Contributes to the product roadmap by advocating for product features and services most frequently requested by clients or that have the highest likelihood of increasing customer loyalty and retention. Uses ideas and suggestions from clients to identify features and improvements that will have broad appeal to other customers and attract new business.

- Serves as the “voice of the client,” identifying the features with the most appeal and advocating for their inclusion. Accurately communicates client expectations.
- Works with clients to identify at least one new product enhancement quarterly to improve overall competitiveness and marketability.
- Responsible for planning and coordinating annual user meeting, and for collecting ideas for new product or service features and improvements to contribute to product roadmap. Creates agenda with input from executive team; organizes resources; works with marketing to promote meeting, uses customer service staff and product managers to encourage attendance and participation in the survey.
 - Achieves 100 percent participation by clients with annual recurring revenues of \$25,000 or more.
 - At least five ideas from clients make it onto the product roadmap annually.

QUALITY ASSURANCE & SALES SUPPORT

- Upon request from the CTO or the QA Lead, coordinates activities of customer service staff in participating in quality assurance and software releases.
 - Assures staffing levels are sufficient to complete QA process and release such that 100% of tickets are completed on schedule without disrupting Customer Service and SLAs.
 - Immediately notifies QA Lead when confronted with issues or obstacles that are beyond employee’s ability to correct and which may prohibit employee from completing QA tasks on time.
- Upon request from the Vice President of Sales, coordinates activities of customer service staff in performing product demonstrations for new or prospective clients.
 - Product demos conducted by customer service staff accurately communicate features of Auto-Graphics products in a way clients find easy to understand and to remember.
 - Customer Service staff can conduct effective, accurate product demonstrations within 60 days of date of hire.
- As requested, coordinates activities of customer service staff in contributing to Requests for Proposals.
 - Contributions to RFPs accurately communicate features and benefits of products, are provided on schedule and are free of typos or grammatical errors.
- Directly responsible for maintaining a list of reference accounts who agree to provide positive reviews to prospective buyers to include in RFPs, press releases and marketing materials.
 - List includes four or more reference accounts for each product offering.

REPORTING

- Monitors and reports on customer service productivity, including the number of active help tickets open, tickets closed, and the source of the help ticket (i.e., customer, employee, etc.).
 - Publishes reports and analysis weekly and monthly to President. Reports highlight trends and, where a negative trend is detected, actions and timetables for improvements.

- Conducts annual customer satisfaction survey to measure customer loyalty and identify areas for improvement. Publishes results with recommendations for improvements to President and executive team.
 - Uses a third-party vendor to create survey, conduct analysis and publish results. Report includes specific areas and actions for improvement.
 - Year-over-year report shows consistent improvement in customer satisfaction and loyalty.

AGILE PROCESS

- Participates in bi-weekly SCRUM meetings and daily standups. Accurately communicates status of tasks or activities for which the department is responsible. Escalates appropriately when activities are “blocked”, and the department is at risk of missing deadlines and commitments. Works effectively with others to consistently meet or exceed expectations and meet deadlines.
 - Assures that estimates of effort provided by customer service staff are accurate and that deadlines are realistic and can be met.
- Assures that customer service staff use JIRA to accurately record and update status of tasks and activities.
 - Reviews status daily to assure deadlines are met and actively intervenes to reassign resources or remove blockages and obstacles.

GOAL SETTING AND ACCOUNTABILITY

- Is actively supportive of the Auto-Graphics culture of goal setting and personal accountability.
- With input from the President, contributes personal goals for each quarter.
 - Consistently provides goals that are SMART (Specific-Measurable-Attainable-Relevant-Time-based).
- Tracks results, reports on progress, anticipates problems, and makes adjustments. Immediately notifies Manager of Customer Service when barriers or obstacles may prevent accomplishing goals.
 - Notifies President within 24 hours when encountering insurmountable barriers or obstacles that might prevent achieving goals.
- Is personally accountability for successes and failures. Takes the time to reflect on successes and failures and identify ways to improve performance.
 - Achieves 95% quarterly goals.

SUPERVISORY RESPONSIBILITIES: The Manager of Customer Service supervises a staff of eight Customer Service Specialists and Senior Customer Service Specialists with the assistance of a Customer Service Lead and a Technical Lead.

COMPETENCIES:

To perform the job successfully, an individual should demonstrate the following competencies:

- Technical Learning. Picks up on technical things quickly; can learn new skills and knowledge; is good at learning new industry, company, product, or technical knowledge--like Internet technology; does well in technical courses and seminars.

- Problem Solving. Uses rigorous logic and methods to solve difficult problems with effective solutions; probes all fruitful sources for answers; can see hidden problems; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.
- Interpersonal Savvy. Relates well to all kinds of people, up, down, and sideways, inside and outside the organization; builds appropriate rapport; builds constructive and effective relationships; uses diplomacy and tact.
- Customer Focus. Is dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.
- Dealing with Ambiguity. Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; doesn't have to finish things before moving on; can comfortably handle risk and uncertainty.
- Planning. Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results.
- Managing and Measuring Work. Clearly assigns responsibility for tasks and decisions; sets clear objectives and measures; monitors process, progress, and results; designs feedback loops into work.

CORPORATE VALUES:

- Integrity – We embody high standards, fairness, and honesty in all that we do.
- Quality – We deliver excellence in everything we do.
- Fiscally Responsible – We invest our time and money wisely.
- Innovation – We adapt trends and technology to customer and company needs.
- Accountability – We keep our commitments, and we own our actions and outcomes.

QUALIFICATIONS:

The ideal candidate has a library-related degree (i.e., Master of Library Science or similar experience or background), and has five years or more of senior-level experience managing technical support and in-person and remote user training for a SaaS application provider. Demonstrable experience in customer satisfaction and retention of large enterprise clients is required. Advanced skills in the use of Microsoft Office are also necessary. An MLIS with experience with library systems technology is highly desirable.

The ideal candidate picks up on technical things quickly, can learn new skills and knowledge; is good at learning new industry, company, product, or technical knowledge. He or she will have finely-honed problem-solving skills, using rigorous logic to solve difficult or complex problems, and an ability to look beyond the obvious and not stop at the first answer. The ideal candidate relates well to all kinds of people, builds constructive and effective relationships with others, and is dedicated to meeting customer expectations and requirements and gains their trust and respect. He or she will also cope effectively with change and shift gears comfortably.

The ideal candidate is an effective manager and good at planning, accurately scoping out the length and difficulty of tasks and projects, setting goals and objectives, organizing people and activities to get the

work done. He or she clearly assigns responsibility for tasks and decisions; sets clear objectives and measures; monitors process, progress, and results; designs feedback loops into work.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations will be made to enable individuals with disabilities and/or medical conditions to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk; climb or balance and stoop, kneel, crouch, or crawl.

The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus. Travel and overnight stays are required periodically for presentations at clients' locations.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations will be made to enable individuals with disabilities and/or medical conditions to perform the essential functions. The noise level in the work environment is usually moderate.

NEW EMPLOYEE ONBOARDING

- In first two weeks demonstrates mastery of Salesforce, Jira, phone system and help desk technologies to the satisfaction of the President.
- In first two weeks is actively participating in product roadmap meetings, bi-weekly SCRUMs, and daily standups as the primary representative of the customer service department
- Within 30 days of the date of hire demonstrates proficiency in SHAREit, VERSO and MONTAGE products to the satisfaction of the President.
- Within 30 days demonstrates mastery of department workflows and processes, SLAs, and customer service standards to the President.
- Within 60 days demonstrates ability to solve 90 percent of the most common Level I and Level II customer support tickets without assistance from others.
- Within 60 days can conduct demonstrations of SHAREit, VERSO and MONTAGE products to the satisfaction of the President.
- Within 60 days has contacted all clients and collected feedback on the customer service department and areas for improvement and provided a report to the President.
- Within 90 days can perform steps necessary for installing a new instance of SHAREit and VERSO.
- Within 90 days presents an evaluation of the Customer Service department, including an assessment of staff skills, an evaluation of SLAs and service standards, an evaluation of customer training and an evaluation of department workflows and processes, including ideas and areas for improvement.
- Within 90 days has identified a third-party vendor for conducting training to improve the customer service skills of department staff, and a third-party vendor to conduct customer satisfaction research.

- Within 90 days has researched and developed proposal for the creation of a formal customer loyalty program for Auto-Graphics aimed at increasing customer retention and has presented to President and Executive team. Research includes review of available customer loyalty technology platforms, industry best practices and metrics for measuring and monitoring loyalty and retention.