



Canadian
Supply Chain
Sector Council

Conseil canadien
sectoriel de la chaîne
d'approvisionnement

OCCUPATIONAL STANDARD

(For use in the development of supply chain related job descriptions, performance evaluations, career development plans, etc.)

Position:	CUSTOMER SERVICE MANAGER
Description of Position (As defined by the CSCSC Stakeholder Community)	<i>Customer Service Managers plan, organize, direct, manage, evaluate, and are responsible for customer service activities, budget, policies and procedures of an organization.</i>
Position Development	Advancement to senior management positions is possible through progressively responsible positions and management experience.
Required Qualifications:	(Education, Training, Related Work Experience)
Education	A bachelor's degree or college diploma in a relevant area is usually required; however, a combination of related supply chain customer service training and experience may be considered an equivalent. A relevant professional designation is considered an asset.
Training	Candidates generally need some on-the-job training, but typically organizations require that the individual will already have the required skills, knowledge, work-related experience, and/or training.
Related Work Experience	Several years of experience in supply chain based customer service or a related function (e.g., sales, finance, marketing, etc.) is required.
Tasks:	
Customer Service Managers perform <i>some or all</i> of the following tasks	<ul style="list-style-type: none"> • Plan, organize, direct, manage, and evaluate the customer service activities and budget of an organization • Develop, implement and / or manage the organizations customer service policies, procedures, standards, and strategies Comply with and maintain knowledge of applicable rules, regulations, standards, and best practices • Ensure all customer service activities support and strengthen the strategic objectives of the overall organization • Confer with management and staff coordinating customer service activities • Develop and measure key performance indicators to determine and

*Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.

	<p>improve the effectiveness of all customer service activities</p> <ul style="list-style-type: none"> • Prepare or oversee the preparation of reports and statistics related to the customer service function for upper management • Maintain current technical skills and apply new knowledge to management tasks for the improvement of customer service activities • Maintain product or service knowledge • Analyze customer service related information and evaluate the results to choose the best resolutions and alternatives to customer service challenges, and to identify opportunities to improve customer service • Provide customer service personnel with guidance in handling difficult or complex issues or problems so they can be resolved effectively and efficiently. Provide guidance on how to escalate complaints / disputes within the organization • Resolve customer complaints and answer customers' questions regarding organizational policies and procedures • Interview, select, coach, train, instruct, manage, and appraise the performance of associated customer service personnel and mentor select staff • Develop and maintain constructive and cooperative working relationships with stakeholders • Collaborate and communicate knowledge (e.g., market information, customer insights, trends, etc.) across the business. • Communicate information to stakeholders using appropriate communication methods • Identify opportunities to add value beyond problem resolution to relevant business areas (e.g., sales, marketing, product development, etc.) • Perform and/or direct day to day administrative tasks • Manage projects (e.g., complaint resolution processes, etc.)
Tools and Technology:	
	<ul style="list-style-type: none"> • Computer Hardware and Associated Software and Systems (i.e. customer relationship management, enterprise resource planning, project management, spreadsheet, word processing, presentation, accounting, document management, human resources, financial planning, database user interface and query, electronic mail, internet browser) • Communication Devices

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**

Required Competencies:	(Knowledge, Skills, Personal Attributes)
Knowledge	A Customer Service Manager should have knowledge of supply chain and related business functions (e.g., finance, marketing, etc), applicable laws and regulations (e.g., labour laws, etc.), customer and personal service, administration and management, the English language, other languages as required, mathematics, education and training, clerical, personnel and human resources, relevant tools and technology, economics and accounting (e.g. costing of customer service), cross-enterprise and business strategy knowledge (e.g., marketing, sales, information technology, labour relations, etc.)
Skills	A Customer Service Manager should have the following skill sets: negotiation, persuasion, supervisory, active listening, speaking, reading comprehension, critical thinking, analytical thinking, performance monitoring, time management, management of personnel resources (i.e., can include large and diverse teams both on and offsite), judgment and decision making, project management, mathematics, presentation, operations analysis, conflict management and resolution, teambuilding and social awareness,
Personal Attributes	(Abilities, Work Values, Work Styles)
Abilities	The following abilities are important to the role of Customer Service Manager: oral expression and comprehension, speech clarity and recognition, written expression and comprehension, inductive and deductive reasoning, problem sensitivity, emotional intelligence, and empathy.
Work Values	<p>Individuals who will succeed in this position:</p> <ul style="list-style-type: none"> • empower employees to work collaboratively internally and externally, but also independently with the ability to make decisions; • embrace opportunities for increasing responsibilities and good working conditions that are health and safety conscious; • offer support; • empower employees to provide service to others and work with co-workers in a friendly environment; • demonstrate and advocate integrity and ethical behaviour; • are results / goal oriented (through collaboration with staff and relevant stakeholders); • are customer focused; and • demonstrate respect for customers, stakeholders and coworkers.

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**

Work Styles	The following work styles are attributable to a Customer Service Manager: self-control, stress tolerance, dependability, timeliness, attention to detail, cooperation, persistence, initiative, leadership, adaptability/flexibility, integrity, independence, cooperation and positive outlook / disposition.
Essential Skills Profile:	<p>Essential Skills are the skills needed for work, learning and life. They provide the foundation for learning all other skills and enable people to evolve with their jobs and adapt to workplace change. For more detailed essential skills profiles please refer to the HRSDC website: http://www.hrsdc.gc.ca/eng/workplaceskills/LES/index.shtml</p> <p>The Human Resources and Skills Development Canada (HRSDC) Essential Skills Research Project focused on occupations requiring a secondary school diploma or less and on-the-job training. As such a formal Essential Skills Profile for the occupation of Customer Service Manager has not yet been created by HRSDC.</p> <p>The following section contains essential skills information identified in existing occupational standards and classified using the nine Essential Skills categories. Note that the content is not associated with HRSDC and the Essential Skills Research Project.</p>
Reading Text	<ul style="list-style-type: none"> • Frequently read text in both print and non-print media <ul style="list-style-type: none"> ✓ trade magazines ✓ newsletters ✓ periodicals ✓ contracts ✓ resumes ✓ performance reports ✓ staff schedules ✓ meeting minutes ✓ requests or complaints • Read and interpret dense and complex texts, and have ability to make high-level inferences using specialized knowledge <ul style="list-style-type: none"> ✓ financial statements and reports ✓ policies and procedures ✓ trade terms ✓ international standards ✓ regulations ✓ instructional and managerial technique products • Frequently read paragraph length text in charts, tables and graphs
Document Use	<ul style="list-style-type: none"> • Documents produced and/or used may include price tables, stock lists and tables, purchase requisition/order forms, back order lists, forms, inventory sheets, invoices, order forms, work schedules, databases, accounting and financial statements, various

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**

	<p>administrative forms, etcetera, in both print and non-print media</p> <ul style="list-style-type: none"> • Must be able to read simple to complex documents in which considerable inference may be required • Specialized knowledge of the content of the document may be required; multiple pieces of information from multiple sources are synthesized; the quality of information may be evaluated for accuracy and omissions
Writing Skills	<ul style="list-style-type: none"> • Write notes to senior management regarding department performance, to document problems requiring attention, requests for resources, etcetera • Write customer service policies and procedures, and ensure compliance • Write on a variety of topics including company policy, customer service challenges, as well as responses to customer inquires and/or complaints • Write performance evaluations • Revise writing of others for factual accuracy, grammar, spelling and effectiveness • Write reports to stakeholders – reports may contain, for example, the monthly evaluation or a situation analysis and recommendations
Numeracy	<ul style="list-style-type: none"> • Apply financial math/money math • Apply scheduling, budgeting and accounting math • Apply measurement and calculation math • Apply data analysis math • Utilize numerical estimation
Oral Communication	<ul style="list-style-type: none"> • Provide clear and concise direction and instructions to staff and other departments, sometimes during high stress situations • Professional communications with clients, customers, staff, and colleagues using a variety of communications devices and media • Exchange information with other managers and senior management • Communicate on staffing related matters • Conduct staff meetings and make presentations
Thinking Skills	(Problem Solving, Decision Making, Job Task Planning and Organizing, Significant Use of Memory, Finding Information)
Problem Solving	<ul style="list-style-type: none"> • Engage in dispute management and resolve customer and staff complaints • Apply broad knowledge of supply chain and customer service when problem solving • Address customer service related challenges using the appropriate

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**

	<p>problem-solving and investigation methods</p> <ul style="list-style-type: none"> • Identify problems with the implementation of procedures, and take the appropriate action to deal with them • Adapt negotiation strategies to cope with new circumstances or issues that arise • Identify practical solutions when work is backlogged through prioritization and rationalization exercises
Decision Making	<ul style="list-style-type: none"> • Decisions are made in line with the customer service strategy of the organization • Make decisions with market, economic, social, and political environments taken in to account • Make customer service-based conflict resolution decisions • Make decisions about staffing requirements • Allocate specific work activities to self, employees, and others such as contractors or subcontractors
Job Task Planning and Organizing	Liaison with staff, other management, and customers is needed to co-ordinate customer service activities.
Significant Use of Memory	<ul style="list-style-type: none"> • Remember the objectives and vision of the organization • Remember the policies and procedures of the organization • Remember applicable standards and regulatory requirements • Remember customer contact information and service requirements
Finding Information	<ul style="list-style-type: none"> • Search databases to find customer contact information, details of complaints, service resolutions and agreements, etc. • As applicable, obtain information on standards and regulations • Find information for budgeting purposes
Working with Others	Customer Service Managers are generally self-directed and work as part of a broader team. They provide encouragement and support to team members and assist them in achieving their personal work objectives, the team work objectives, and provide recognition when objectives have been achieved. They often will consult with relevant colleagues for their views, concerns and issues related to customer service challenges.
Continuous Learning	Enhanced learning may be acquired as part of regular work activity, through training offered in-house, through reading or other forms of self-study, or through off-site training. Ongoing learning occurs through participation in professional organizations, seminars, formal courses, conferences and trade shows. Skills may be upgraded by taking management classes through educational institutions and training providers.

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**

Additional Information	(Physical Aspects, Attitudes)
Physical Aspects	A Customer Service Manager works extensively in an office environment; however, may also be required to partake in outside travel – sitting for long periods of time, with repetitive computer and telephone use. Typically there is no heavy lifting, bending, or stooping required by a Customer Service Manager.
Attitudes	Attitudes of a Customer Service Manager include a strong commitment to leadership and management. A Customer Service Manager should have excellent interpersonal skills, negotiation skills, and conflict resolution skills. Furthermore, excellent planning and organizational abilities are required. Flexibility and an exhibited awareness of, and sensitivity to other cultures are considered important as a Customer Service Manager works with diverse groups, individuals and interests.
Future Trends Affecting Essential Skills:	<p>Increasing computerization may mean that Customer Service Managers will require enhanced computer skills in order to work with more complex software platforms, communication tools, and technology. Specifically, familiarity with methods (e.g., technology, tools such as social media, etc.) to develop, acquire, disseminate, and manage knowledge (e.g., knowledge from related business functions, customer insights, etc.) will also be of increasing importance as it can help drive opportunities for business development.</p> <p>Experience with managing and / or interacting with virtual teams (e.g., team members that are offsite / offshore at multiple locations, automated customer service functions, etc.) will be necessary as business models continue to change and evolve. Furthermore, knowledge of relevant international laws and regulations, and new and emerging financial instruments and tools is and will continue to be essential in a growing global economy.</p> <p>The ability to speak more than one language, and an awareness of and sensitivity to the diversity of international cultures is considered a growing need in the face of increasing globalization.</p>

<p>Government of Canada Defined - Related NOC Code & Description</p>	<p>0621 Retail Trade Managers Retail trade managers plan, organize, direct, control and evaluate the operations of establishments that sell merchandise or services on a retail basis. Retail trade managers are employed by retail sales establishments or they may own and operate their own store.</p>
---	--

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**

Document Management:				
Activity #	Activity Type*	Replaces	New Version Name	Responsible Individual
1	Document Created	Not Applicable	March 29, 2010	M. Cheddi (CSA)
2	Document Modified	March 29, 2010	October 29, 2010	M. Cheddi (CSA)
3	Document Finalized	October 29, 2010	April 12, 2011	C. Sellar (CSA)
4
5

***Activity Types:**

- ✓ Document Created
- ✓ Document Modified (Minor Corrections & Editorial Changes)
- ✓ Document Updated (Complete Review)
- ✓ Document Finalized
- ✓ Document Retired

***Note the OS addresses alternative position titles including Service Manager, Customer Service Manager – Supply Chain, Customer Relations Manager, etc.**