

**POSITION DESCRIPTION for CUSTOMER SERVICE SPECIALIST**

**IDENTIFYING INFORMATION**

**Job Title:** Customer Service Specialist

**Regular Hours:** M-F; specific hours may vary

**Department:** Customer Service

**FSLA:** Non-Exempt

**Reports To:** Customer Service Manager

**Effective Date:** January 1, 2020

**POSITION SUMMARY**

**PRIMARY FUNCTION**

The Customer Service Specialist processes customer emails and phone calls in a friendly and timely manner. These customer inquiries may include requests for new quotes and orders to be entered into the business system, to follow-up on existing quotes and orders, or for general product information.

**YOUR NUMBER**

For each position, Swagelok Northern California utilizes one key metric to drive success and provide clarity in decision-making. The key metric (“Your Number”) for this position is: **0 Service Level Agreement (SLA) breaches on customer tickets.**

**DUTIES AND RESPONSIBILITIES**

- **Solve Customer Requests.** Respond to, investigate, and solve customer inquiries, concerns, and issues via multiple channels in a timely and courteous manner.
- **Process Transactions.** Enter and manage Sales Quotations and Sales Orders into business system and provide appropriate technical and/or product-related information to support customer requests.
- **Coordinate with Coworkers.** Effectively communicate customer issues and concerns to all applicable internal staff members.
- **Maintain Customer Information.** Document all customer-related contacts, actions, and responses in ticketing system to ensure that responses are complete and meet customer expectations.
- **Learn Swagelok.** Maintain and develop working knowledge of products and/or services.
- **Proactively Utilize Reports.** Monitor and follow up on open order and backorder reports to proactively ensure we adhere to high standards of customer service.
- **Follow-up on Orders.** Monitor open sales orders in business system to ensure on time delivery.
- **Reduce Customer Obstacles.** Use internal supply chain resources to identify alternative parts and minimize lead times for customers.
- **Find Solutions Cross-departmentally.** Collaborate with associates from other departments at Swagelok Northern California and Swagelok corporate personnel as needed to resolve customer escalations and issues.
- Perform other related duties as assigned by management.

**EDUCATION AND EXPERIENCE**

## POSITION DESCRIPTION for CUSTOMER SERVICE SPECIALIST

### EDUCATION & CERTIFICATIONS

Bachelor's degree (B.A./B.S.) from four-year college or university; or equivalent combination of education and experience (required)

### WORK EXPERIENCE

Two years' experience in customer-facing or customer service roles required.

### SKILLS & COMPETENCIES

- Proficiency in Microsoft Office applications (Word, Excel, Outlook, PowerPoint)
- Basic Excel knowledge, including:
  - Basic arithmetic formulas (addition, subtraction, multiplication, division)
  - Basic arithmetic functions (SUM, AVERAGE, COUNT, etc.)

### ESSENTIAL VALUES FOR SUCCESS AT SWAGELOK NORTHERN CALIFORNIA

- **Respect.** Create an environment where people are trusted, respected, and treated fairly.
- **Innovation.** Challenge conventional wisdom to create new value for the customer.
- **Customer Focus.** Create value for the customer in order to create value for Swagelok.
- **Integrity.** Choose to do the right thing with courage and character.
- **Quality.** Provide high value and high performance in our products, processes, and services.
- **Continuous Improvement.** Consistently do things better to enhance safety, savings, and productivity.

### PHYSICAL DEMANDS AND WORK ENVIRONMENT

- Continually required to sit or stand
- Occasionally required to move around an office, production or warehouse environment
- Continually required to communicate with various stakeholders
- Continually required to read and view a computer screen
- While performing the duties of this job, the noise level in the work environment is typical of an office, production or warehouse setting.