

JOB DESCRIPTION

PROGRAM: STEP Service Navigation

JOB TITLE: Customer Service Lead

PAY GRADE: 10

JOB SUMMARY

Under the direction of the Service Navigation Director, provide vision and positive leadership to the Service Navigation team. Responsible for supervising assigned Service Navigation staff who work within customer service programs, ensuring the scheduling and management of a customer-friendly reception of visitors and telephone calls to STEP's Main Office, and ensures implementation and daily performance of assigned navigation programs. Assists with provision of programs for individuals and families with multiple needs to obtain and maintain self-sufficiency through a case management approach. Additionally, supports the Service Navigation Director with development, implementation, and oversight of customer service programming. Reviews enrollment applications and assessments to engage and collaborate with customers to establish goals that facilitate self-empowerment and work towards self-sufficiency. Works in partnership with other STEP programs to meet the needs of program participants.

SUPERVISORY RELATIONSHIPS

SUPERVISES: Family Navigator, Compliance/Customer Service Specialists, Office Assistant, and Informational Assistant

REPORTS TO: Service Navigation Director

ESSENTIAL QUALIFICATIONS

- Bachelor's degree in a human service-related field;
- Two years of prior casework experience;
- Two years of experience in a supervisory role (i.e., enforcing policies and regulations, motivating staff, and providing support and direction);
- Demonstratable experience with federal, state, and city laws, programs, and resources;
- Demonstratable experience working with diverse individuals including those with a disadvantaged socioeconomic background; and,
- Demonstratable experience in working and communicating with other social service agencies, schools, etc.

GENERAL REQUIREMENTS

- Valid driver's license and reliable transportation available on a daily basis with adequate insurance coverage;
- Pennsylvania State Police Criminal History Clearance, Child Abuse Clearance, FBI Clearance, and National Sex Offender Registry check current within 90 days of employment; and Motor Vehicle Record check;
- Recognizing and Reporting Child Abuse training completed within 90 days of hire;
- Mental and physical ability to perform essential job functions without any health restrictions, including the ability to sit for long periods of time, stand, lift and carry up to twenty pounds unassisted, have unrestricted use of the upper body, finger dexterity, and corrected or uncorrected hearing and vision within normal ranges, and a clear speaking voice;
- Computer training and/or documented proficiency with Microsoft Office products;
- Flexibility to work altered and non-traditional work schedules as assigned; and,

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- ❑ Participation in job-related training as assigned.

SPECIFIC DUTIES

- ❖ Supervises assigned Service Navigation staff; ensure customer-friendly reception of visitors and telephone calls to STEP's Main Office;
- ❖ Interviews, as part of a team, when filling assigned staff positions; and orients and trains new staff;
- ❖ Sets, communicates, and implements high standards and provides positive, energetic, and creative leadership;
- ❖ Engages as a member of the Service Navigation Leadership Team, focusing on collaboration, staff morale, positive culture, and overall team management;
- ❖ Promotes the vision and goals of STEP Pathway programs internally and externally;
- ❖ Establishes and maintains a positive work environment that promotes employee engagement with the mission;
- ❖ Provides leadership, administration, monitoring, and evaluation to assigned Service Navigation staff, which includes completing staff evaluations and processing timesheets, reviews and recommends action on PTO requests, and assures Service Navigation Director is aware of staff performance and assists with disciplinary process as needed, including documentation;
- ❖ Leads analysis of all Service Navigation systems and operations; recommends efficiencies and economies; monitors implementation of approved initiatives; recommends revisions, as needed;
- ❖ Promotes and assures the highest possible levels of accountability and quality within program operations;
- ❖ Champions the rigorous use of data to drive accountability and ensures program quality;
- ❖ Leads program conversion from paper to secure electronic recordkeeping systems and data storage, as indicated;
- ❖ Develops, implements, monitors, and as needed, revises comprehensive program record keeping and reporting systems, including multiple automates information management systems to generate meaningful records and reports of activities, deliverables, and outcomes to support programmatic and fiscal planning and operations; monitor data fidelity in multiple data systems;
- ❖ Prepares supporting documentation before, during, and after onsite for federal, state, and county reports, monitoring reviews, agency audits, and all other monitoring and evaluation activities; assists with any required program response;
- ❖ Oversees high-quality implementation and promotion of programming in relation to grant requirements and customer needs;
- ❖ Leads staff in developing, maintaining, and extending collaborative alliances with community partners and stakeholders for shared planning, services delivery, advocacy, and public relations;
- ❖ When directed, serves as the spokesperson and representative of STEP's Service Navigation programs in the community, region, state, and nation; promotes and advocates for the programs and those we serve;
- ❖ Identifies and pursues strategies designed to increase public awareness of Social Determinants of Health concerns broadly, locally, regionally, and nationally;
- ❖ Assumes responsibility for ongoing personal professional growth and development; maintaining and improving competencies within the field of administration, management, and other relevant fields;

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- ❖ Serves as a positive role model;
- ❖ Works in collaboration with the Leadership Team to review new opportunities, develop work plans, guidelines, and make appropriate assignments to staff;
- ❖ Engages as a member of the SN Leadership Team, focusing on collaboration, staff morale, positive culture, and overall team management;
- ❖ Monitors program progress on achievement of goals, outcomes, and deliverables; oversee monitoring activities of assigned team members;
- ❖ Improves the operational systems, processes, policies, and procedures in support of the agency's mission; specifically support the management of reporting, information flow, and planning;
- ❖ Ensures proper coverage of front desk, switchboard, and other team responsibilities;
- ❖ Ensures telephone calls and visitors are received and screened in a prompt, courteous, and customer-friendly manner, the nature of their interest is effectively determined, and the visitor is appropriately directed; ensures messages are recorded and relayed thoroughly; performs receptionist and switchboard duties when needed;
- ❖ Works closely with Service Navigation personnel to ensure the One-Stop process is completed;
- ❖ Enters and oversees the entry of data into the ClientTrack database; ensures referrals and connections are made with the intake and assessment staff and when appropriate, referrals to a Service Navigator;
- ❖ Reviews and analyzes customer records as a part of the oversight process; advises staff concerning documentation and actions taken with customers, and reviews files and other documentation for appropriateness and completeness;
- ❖ Acts cooperatively in matters needing interpretation of customer objectives and explanation of actions and outcomes;
- ❖ Works with customers individually, in families, or in small groups regarding plans to meet needs; assists customers in determining a plan of action to overcome existing barriers, and works with customers in their attainment of self-sufficiency;
- ❖ Gathers and evaluates customer information on barriers relating to the customer's stabilization;
- ❖ Develops individualized goals and service plans with customers;
- ❖ Provides referrals and linkages to STEP programs and/or local resources and coordinates community services;
- ❖ Correlates customer needs with available programs and provides leadership and/or assistance to individuals and families in linking them with the proper service(s);
- ❖ Provides daily, weekly, or bi-weekly follow-up; monitoring and evaluation of household progress through home visits, phone contacts, office visits, and written correspondence;
- ❖ Performs routine office tasks necessary for the operation and presentation of a professional office; and,
- ❖ Performs all other tasks as assigned.

REQUIRED KNOWLEDGE, SKILLS & ABILITIES

- ❖ Knowledge of the following:
 - Professional supervisory and casework principles and methods;
 - Effective customer service principles;
 - STEP operations in order to properly route incoming calls and answer questions;
 - Service delivery area and the community resources and agencies that serve the area;
 - Current social, economic, and health problems and the resources to meet target population needs;

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- Various program eligibility requirements, including governmental, utility company, or those required by other funding sources;
 - Individual and group behavior and ways to effectively work with each;
 - Microsoft Office Suite, including but not limited to Microsoft Word, Outlook, Excel, Access, Power Point, and Publisher components; and,
 - Federal, state, and city laws, programs, and resources.
- ❖ Skill in the following:
- Providing direct supervision to staff;
 - Writing, editing, and communicating, including knowledge of English grammar, spelling and punctuation as they would relate to the production of reports, work plans, and other operational documents, as well as their use in communicating with a variety of individuals and groups;
 - Using and routing electronic mail and correspondence, using the Internet for various purposes; using a variety of software within a personal computing environment for computer navigation and document management;
 - Using a keyboard and personal computer;
 - Oral communication skills, such as speaking, listening, and interviewing; and,
 - Using tracking and reporting systems, including automated management information systems.
- ❖ Ability to perform the following:
- Maintain a high volume, fast-paced caseload;
 - Communicate effectively in writing and speaking; ability to communicate effectively with individuals and large groups;
 - Establishing and maintaining effective working relationships with staff, administrators, partnering agencies, elected officials, government agencies, businesses, customers, and the general public;
 - Identify and meet goals, objectives, outcomes, and timelines within broad parameters and work independently of direct supervision;
 - Implement administrative procedures and operations;
 - Maintain professional boundaries with customers and staff;
 - Analyzing, evaluating, and recommending action on customer needs;
 - Efficiently answer a wide variety of questions from telephone inquiries or walk-in visitors, and deal with the public in an empathetic manner;
 - Communicating and working with individuals possessing targeted barriers to self-sufficiency;
 - Efficiently utilizing a personal computer or laptop computer, including the entering of data into a software system and producing required reports;
 - Operate a multiline phone;
 - Operate various normal and advanced office and mail processing equipment with appropriate speed and efficiency; advanced office equipment includes networked color copiers and digital duplicators;
 - Being creative, resourceful, and flexible;
 - Demonstrating respect for individuals and groups with varied cultural, racial, ethnic, religious, and linguistic identities or backgrounds;
 - Collecting, organizing, analyzing, and processing information accurately, quickly, and efficiently;

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- Prioritizing multi-tasked and multi-faceted work;
- Soundly interpreting and applying regulations and procedures;
- Projecting a positive image;
- Thinking creatively and working cooperatively with staff and outside agencies to promote and improve services;
- Organizing, prioritizing, and establishing schedules to accomplish program goals and evaluate the delivery of service and program objectives;
- Preparing and maintaining written records and reports;
- Interpreting written and oral information;
- Identifying and meeting goals, objectives, outcomes, and timelines within broad parameters and working independently of direct supervision;
- Maintaining confidentiality at all times;
- Clearly communicating with individuals and groups of diverse cultural backgrounds both orally and in writing; and,
- Planning and organizing work, preparing adequate records and reports, setting priorities, and maintaining a caseload in an effective and timely manner.