**Stars Hollow Hat Company**

**Company History**

The Stars Hollow Hat Company was founded in 2005. The company embroiders and sells hats to clients consisting of athletic organizations and other companies who want to give their employees hats with their company logo. Up until December of 2006, the company had 6 employees, including the owner. 1 Customer Service / Sales Representative and 4 Production staff (they make the hats). Since this time, the business has grown and the owner hired 6 additional customer service / sales representatives. In February of 2007, the Director promoted one of the customer service / sales representatives to Supervisor. Also, since February, each customer service / sales representative has taken on additional duties which vary between positions.

**Community Profile**

In 2007 the City of Stars Hollow had a population of 1,500 and County Milky Way, of which Stars Hollow City is the County Seat, had a population of 5,000. Given current trends, the City is expected to achieve a population of 2,300 by the year 2010. Stars Hollow City is located on the South West region of Wisconsin. Agriculture is the primary industry and a major component in the economy of the Stars Hollow City and the North East region.

**Current Situation**

Since the company has increased its customer base and added employees to meet the demand, the owner would like to have the jobs analyzed and determine a hierarchy (job family). She thinks that she will be adding even more reps in the next few months who will be focused more on the sales side.

The Customer Service / Sales Supervisor perceive that some of the sales/customer service representatives are not motivated to do the “sales” side of their job and up-sell current customers who call in to place orders. Those individuals who are not motivated to sell have shown excellent skills on the customer service side of the job (problem solving, managing conflict), but they don’t necessarily possess the skills for sales. She thinks that possibly separating the duties and creating two job families, one for customer service and one for sales may be beneficial.

Today, the Company employs 1 Customer Service Supervisor, 6 customer service / sales representatives, 8 production staff, and one (1) administrative assistant. 3 months ago the owners niece, who is an HR Manager for a large company in Kansas, offered to help out and conducted a functional job analysis of the customer service / sales representative job. A copy of the job analysis may be found in Appendix "A."  The functional job analysis consisted of an interview with the Customer Service Supervisor (Subject Matter Expert) who described the functions of the job, as well as the KSAs. In addition, as part of the analysis, the Customer Service Supervisor rated the importance and level of difficulty of each function and KSA. This allows the analyst to identify and prioritize the “essential” functions and KSAs. Only “essential” functions and KSAs are transferred to a job description.

As a next step in the project, the owner would like to use the information from the job analysis to create job descriptions. She would also like to establish Job Families: Customer Service and Sales. She needs your help!

**Assignment Directions:**

The owner’s niece does not have the time to complete the rest of this project. The owner has asked you to help her out. The owner thinks the company will continue to grow and she wants to be prepared for adding more staff. Therefore, it makes sense to her to create a job family that establishes a hierarchy and creates opportunity for promotions. Ultimately the job family will be used as a way to determine the level of compensation too. But, that is down the road. Today, the owner would like you to utilize the Functional Job Analysis, as well as the company information provided in the case, and outline what the job families may look like for both customer service and sales. She realizes that you will need to make some assumptions (how many levels), but would like an idea of what the job families *could* look like. Further she would like you to create one job description for customer service representatives and one for sales representatives.

Your deliverables for this project:

* Job Description for Customer Service Representative
* Job Description for Sales Representative
* Sample Job Family for Customer Service
* Sample Job Family for Sales Representative

You’ll find a Job Description Template under Appendix B in this document.

Appendix A

**Job Analysis**

**Position Title:** Customer Service / Sales Representative

**Subject Matter Expert:** Customer Service Supervisor, Stars Hollow Hat Company

This job analysis is based on input from the subject matter expert(s) (SME) named above. The purpose of this job analysis is to identify the functions (group of tasks) performed by the job, and the competencies (knowledge, skills and abilities) necessary for successful performance at Stars Hollow Hat Company. Once the functions and associated competencies are confirmed by the SME, a job description will be created. Only those functions and KSAs that have CRIT scores of 15 or above are considered “essential.” Essential functions are used as part of the Job Description. Further, if there is no incumbent in the position, selection exams (based on the criticality scores) may be created as part of the hiring process.

**Functions:** Functions performed by this position include, but are not limited to, the list that follows. The functions are to be rated by the subject matter expert on a scale of 1 to 5, with 1 representing the lowest and 5 representing highest level for their importance to the job (IMP) and their difficulty of learning (DIFF). Their criticality (CRIT) is derived by multiplying the importance rating by the difficulty rating. Thus, if a function is important but easy to learn, it has a low criticality score and may not considered critical to include in a job description.

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Essential Knowledge, Skills, and Abilities: The following is a list of the knowledge, skills and abilities needed to do the functions involved in the position. There are 22 KSAs included in the list; you may not need to use all the core KSAs or you may need to add additional KSAs.

The column labeled "Functions" contains the function number of the representative functions requiring the particular KSA. These function numbers are to be referenced to the function list above. If you do not need to use a particular KSA, you should indicate not applicable (n/a) in the functions column for that KSA.

The column labeled IMP contains the average importance rating of the KSA on a scale of 1 to 5, with 5 representing most important to doing the job. The column labeled DIFF contains the average rating of the difficulty in learning or making a significant improvement in the KSA. The column labeled CRIT contains the criticality measure obtained by multiplying the importance rating by the difficulty rating. If a KSA is important and difficult to learn, it will be considered critical to include in an assessment for selection in this position.

The last column labeled ENTRY is the level of the KSA needed at hire. These will be rated on a 1 to 5, with 1 representing little or none of the KSA needed and 5 representing a high degree needed. Those KSA determined to be needed at hire will be weighted accordingly when scored.

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Appendix B

## Job Description Form

Stars Hollow Hat Company

Job Title: Customer Service Representative and Sales Representative

Date 20.06.2014

Non-exempt: Customer Sales Representatives exempt: Sales Representatives

Department: Sales and Customer Service

Job Reports To: Customer Service and Sales Supervisor

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| The customer service representatives were hired to act as a liaison between customers and the company. They serve customers by providing product information and resolving product problems.  Their primary responsibilities include:   |  | | --- | | 1. Resolving customer complaints either via phone, mail, email or social networks. | | 1. Assist with placing orders, refunds or exchanges. | | 1. Assist customers with advice on company information. | | 1. Answer questions about terms of purchase or warranties. | | 1. Report on overall customer satisfaction. | | 1. Handle product recalls. | | 1. Persuade customers to reconsider cancelling orders. | | 1. Close out or open call records. | | 1. Open and maintain customer accounts. | | 1. Recommend products to the owner by collecting customer information and analyzing their needs. |   The sales representatives were hired to sell retail hats to customers, find out what customers want and create solutions while ensuring a smooth sales process. Through business directories and client referrals they work to find new sales leads. Inside office settings they call clients and outside office setting they visit clients in the field. They should accomplish maximum sales profitability, create contacts and secure new business accounts for the company. Their primary responsibilities include: | % Time   |  | | --- | | 30% | | 5% | | 6% | | 9% | | 17% | | 8% | | 6% | | 8% | | 4% | | 7% | |
| Establish and develop business relationships with existing and prospective customers to generate new business for the company and sell company products to them. | 41% |
| Develop proposals and quotations for customers. | 7% |
| Coordinate sales progress and efforts, special developments, information and feedback gathered from the field with the supervisor and customer service department. | 8% |
| Update the management on customer needs and problems and potential for new products. | 4% |
| Coordinate with production on shipping schedules and delivery of purchases. | 9% |
| Make in person visits and telephone calls and determine their potential and value to the company | 8% |
| Develop and implement special sales activities aimed at reducing stock. | 5% |
| Follow up customers in order to collect payment. | 10% |
| Involve in sales and marketing events and seminars and telemarketing events. | 8% |

Essential KSAs

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| Customer Service Representatives should possess the following knowledge skills and abilities to enable them achieve maximum productivity.  Knowledge of product and market.  Listening, phone Conflict resolution skills.  Information analysis and documentation skills.  Clear communication.  Negotiation and persuasion efficiency.  Digital savvy  Pleasant telephone and voice manners. |
|  |
| Sales representatives should have the following essential knowledge skills and abilities: |
| Persuasion and influence ability.  Digital savvy.  Referral maximization.  Trust building.  Ability to combat objections.  Positive attitude.  Demonstrated aptitude for problem-solving.  Results-orientated  Must possess excellent verbal and written communication skills. |

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| Essential Mental Functions |
| Customer service representatives |
| Problem solving  Analyzing and interpreting information  Organizing and coordinating orders.  Memorizing  Social skills. |
| Sales Representatives |
| Good judgment.  Analyzing and interpreting client requirements. |
| Essential Physical Functions |
| Customer Service Representatives |
| Fingering that includes typing and answering the phone.  Escorting clients to the offices. |
| Sales Representatives |
| Travelling and performing field visits |
| Working conditions |
| Customer Service Representatives |
| Clean and well lit environment with own workstation or cubicle space. Full time work that may require weekend or holiday work. |
| Sales Representatives |
| Normal office environment and the job involve field visits so there might be occasional night travels and weekend and overnight work. |

Equipment Used:

Customer Service Representatives

They will need a computer, telephone, headset, and copier.

Sales Representatives

They will need a computer, telephone and a car to move around.  
  
Minimum Education and Experience (type and number of years):

Customer Service Representatives

Have an experience of one year in the field and knowledge and ability to speak fluent and correct English and grammar, with knowledge of another language being an added advantage.

Sales Representative

Have possession of a one year experience in the sales industry. Possess a post-secondary degree in sales. Must be and able to work both independently and within a team environment. Have proficiency in utilization of computer Microsoft Office Suite applications. Have a valid driver’s license.

Additional Comments

Customer service representatives can receive training in the company. These professionals serve as an intermediary between the company and he customers, resolving customer problems and issues concerning the product, they should be willing and able to help customers and exercise a fair deal of patience in frustrating situations.

Working with a group of individuals whose specialty is sales is a great way to add new wholesale accounts and to reach markets that would otherwise not be reached. It is important to constantly check in with the sales representatives to ensure they are meeting set standards.

Job family sample for Customer Service Representatives

Team leader to co-ordinate the activities of the entire team and report to the supervisor.

Senior customer service agents who are more experienced to deal with difficult customer enquiries.

Customer service agents’ to deal with standard customer questions.

Trainees to learn basic job requirements.

Job family sample for Sales Representatives  
 Team leader who will coordinate the activities of the entire team.

Internal sales assistants will promote the products and outbound call targets.

Sales analysts will identify target areas and sell the hats and generate pricing structures.

Direct sales teams will identify targets and follow up on success.  
  
  
  
Approved by:  The Director Date: 20.06.2014

*Note: Nothing in this job description restricts management’s right to assign or reassign duties and responsibilities to this job at any time.*