

Customer Service Representative - Financial Services
Operations
Tufts University

Direct Link: <https://www.AcademicKeys.com/r?job=243316>

Downloaded On: Aug. 31, 2024 10:19pm

Posted Aug. 19, 2024, set to expire Jan. 1, 2025

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| Job Title | Customer Service Representative - Financial Services Operations |
| Department | Tufts Support Services |
| Institution | Tufts University Medford, Massachusetts |
| Date Posted | Aug. 19, 2024 |
| Application Deadline | Open until filled |
| Position Start Date | Available immediately |
| Job Categories | Professional Staff |
| Academic Field(s) | Finance/Investment Management |
| Job Website | https://jobs.tufts.edu/jobs/20858?lang=en-us&iis=Job+Board&iisn=AcademicKeys |
| Apply By Email | |
| Job Description | |

Overview

The TSS (Tufts Support Services) organization delivers administrative and transactional services to schools and central units across the university's four campuses. Activities that are common across the many central divisions and schools have been consolidated, allowing expert teams to provide exemplary support to faculty and staff. Tufts Support Services operates under a governance model that includes service level agreements and corresponding metrics. Tufts Support Services is customer-focused and strives for continuous improvement and high customer satisfaction.

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What You'll Do

The Financial Services Operations Team provides front-line customer service to Account Payable, Procurement Operations, Card Services, and Travel and Expense to support members of the Tufts community (faculty, staff, and student employees) and external customers. Requests are received via phone calls, emails, voicemails, walk-in service, and web forms, and the team is the first point of resolution, acting according to established, standard protocols. The Financial Services Operations Service Team engages on cases in Salesforce, the constituent relationship management (CRM) tool, and manages through close, communicating status, progress, next steps, and resolution to the customer. CSRs contribute to the Salesforce knowledge base and update as necessary, maintaining accurate information, policies, and processes that are compliant and reflect current practices. In addition to direct problem resolution, Support Reps guide constituents through self-service tools, and escalate complex issues to appropriate functional specialists within the Financial Services Operations team and expected to increasingly handle cases independently.

Essential Functions:

- Provide exemplary customer service in a high-volume, fast-paced environment by efficiently answering inquiries, processing service requests, and troubleshooting problems before escalating to the appropriate functional specialists
- Maintain comprehensive knowledge of processes, policies, systems, and requirements, and contribute to internal and external knowledge bases when new issues arise, policies change, or solutions are developed to maintain a robust reference library for our community and support team alike.
- Respond to questions and resolve issues using the Financial Operations knowledge base within Salesforce and Peoplesoft Finance following standard protocols, providing accurate, timely information, and directions for required forms or workflows.
- Recognize trends and escalations while prioritizing; accordingly, collect required data, and record investigation and troubleshooting steps completed before handing off customer issues or requests to other functional groups for resolution or processing.
- Support the TSS model of excellent customer service and continuous improvement through collaborative teamwork, meeting service level agreements while executing tasks in a timely and accurate manner, and identifying opportunities for process improvements, all with customer satisfaction

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at the heart of each transaction.

- Assist with basic transactional tasks to support functional teams with proper training and support. These activities will be secondary to the primary role of handling phone and email inquiries for Financial Operations functions.

What We're Looking For

Basic Requirements:

- Knowledge and experience typically acquired through the completion of a High School/Equivalent/Associated Degree/ High School Diploma or equivalent required and a minimum of 5 years of work experience in applicable field (A/P, Financial Operations, Billing, and/or Customer Service)
- Minimum of 3 years' experience in a customer-facing role
- Proven ability to maneuver difficult conversations and identify creative solutions for both the customer and university
- Proficient in MS Office
- Able to respond effectively to inquiries both in person and over the phone, following established guidelines.
- Attention to detail and accuracy
- Exemplary oral and written communication skills
- Excellent customer service orientation
- Aptitude for using technology and ability to learn and use CRM tool and/or other technologies.
- Able to prioritize, meet deadlines, problem-solve and research thoroughly, contribute to peer learning and collaborate in a team environment.

Preferred Qualifications:

- Associate Degree or Bachelor's Degree
- Professional Certifications: FCP, Project Management

Pay Range



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Minimum \$24.30, Midpoint \$28.90, Maximum \$33.50

Salary is based on related experience, expertise, and internal equity; generally, new hires can expect pay between the minimum and midpoint of the range.

Contact Information

Please reference Academickeys in your cover letter when applying for or inquiring about this job announcement.

Contact