

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefit & Services	POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 437 - 5157 - 905	
DIVISION/UNIT Customer Service / Contact Center	CLASS TITLE Analyst I	
INCUMBENT NAME Vacant	WORKING TITLE Contact Center Analyst	
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
Under the supervision of the Contact Center Team Manager (Supervisor I), the Contact Center Analyst is responsible for providing excellent member service through accurate, consistent, complete, and timely responses to each member contact received through the CalSTRS toll-free telephone number. The Contact Center Analyst supports service level goals, building the foundation to expert level skill needed to efficiently manage contacts.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
	ESSENTIAL FUNCTIONS	
45%	Verbal Member Inquiries: Answer inbound customer inquiries received through CalSTRS' toll-free inbound telephone number. Handles customer questions, complaints, and requests using business and technical knowledge, professionalism, and efficiency to achieve first call resolution; model organizational teamwork by maintaining a high degree of schedule adherence; perform caller verifications and record details of contacts and actions taken to resolve the request and provide appropriate information; skillfully manage calls by actively listening and rephrasing the caller's inquiry, systematically asks questions to clarify understanding, accurately determining the best course of action; speak with confidence and authority to build customer trust; assess and accurately respond to callers needs with empathy and compassion; effective management of call time in order to meet service demands and goals; remain calm under stressful contacts and controls response when criticized or provoked; maximize customer satisfaction and strive to continuously improve service.	
25%	Elevated Member Inquiries: Answer second-level member inquiries referred verbally by less experienced Contact Center analysts. Assist analysts with responding to customer inquiries by confidently providing accurate and complete technical information and guidance; thoroughly research issues and follows through to inform and instruct analysts; identify problems or discrepancies and take appropriate initiative to address and communicate or elevate to leadership; interpret and explain Teachers' Retirement Law, California Education Code, policy memos, administrative directives, and complaints; review and process work orders; identify trends in elevated queue calls and provide effective feedback, including recommendations, to the Customer Service leadership team.	
15%	Business Knowledge: Develop and maintain advanced-level business knowledge to maximize one-and-done member service and assist less experienced analysts. Possesses, acquires, and maintains the technical and business expertise required to do the job effectively and to create helpful customer solutions; demonstrates an understanding of new information and continually strives to build knowledge; most up-to-date and accurate member information; successfully completes all assignments and training processes, hot topics.	
10%	Team Participation: Professionally and effectively represent Customer Service on project teams and committees. Lead or participate on Customer Service project teams to analyze data and recommend process improvements; develop and recommend ways to improve efficiencies; works cooperatively with others to produce innovative solutions; effectively communicates the division's perspective on cross-functional project teams; anticipates possible problems and develops recommendations for resolution; provide regular project updates to leadership and training, as appropriate, to Customer Service staff.	
	MARGINAL FUNCTIONS	
5%	Participate in departmental special projects and system testing. Review proposed CalSTRS publication modifications, letters and web materials for accuracy and consistency. Participate and supports initiatives identified in the Customer Service annual business plan.	

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies located in the [Competency Guide](#) on Central.

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Work in a high-rise building, in an open space environment
- Prolonged periods of sitting
- Ability to use a computer keyboard several hours a day
- Read from computer screens several hours a day
- Talk on the telephone for several hours a day using a headset
- Ability to move up to 10 pounds

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED