

Job Description: Service Dispatcher/CSR

Job Title: Service Dispatcher/CSR
Department:

Work Hours: 7:30am to 4:30pm, 8:00am-5:00pm, Monday through Friday, 40 hours a week plus some overtime during busy season. Also opportunities for spiffs and commissions

Primary Job Function: Maintain the Service Technicians daily schedules and dispatch the technicians as service calls are completed. Schedule return trips with customers when parts are in. Maintain customer database with current information. Clear and concise communications with employees and company customers, including keeping customers apprised as to company schedule and requested lead-times. Provide accounting with maintenance contract billing information. Prepare service invoices and timecards for processing.

Reports to: Office Manager/Service Manager

Required Qualifications:

- Advanced customer service skills.
- Ability to multi-task
- Organized
- Geographical knowledge of service area or map reading skills
- Knowledge of industry is recommended but not required
- Computer skills
- High school diploma or general education degree (GED)
- Two years related experience and/or training in customer service, dispatching or project management or equivalent combination of education and experience

Desired Qualifications:

- Working Knowledge of HVAC Industry
- 3+ years dispatching experience
- Level skills using Microsoft Office products

Daily Duties:

- Take incoming customer calls.
- Schedule and coordinate all service calls as calls are received.
- Create WIP for all service calls.
- Dispatch Service Technicians, one call at a time.
- Confirm all service calls before sending technician
- Dispatch Service Technicians from home to first call.
- Debrief/Closeout Service Technicians after completion of each call.
- Respond to all messages left overnight.
- Maintain the dispatch board / schedule.
- Forecast workload for 1-week out
- Contact customers with a "Parts Pending" status as parts are received for scheduling.
- Follow up on all pending and recommended work with customer utilizing the pending work log.
- Maintain the maintenance agreements,
- Update customer files as information is received from installation. (Extended warranties, equipment info, new customers, referrals)
- Type service contract proposals for new customers
- Maintain customer history files in database
- File service tickets and PMA's
- Prepare paperwork for all manufacture warranty parts
- Facilitate return of warranty parts
- Update service database from service ticket
- Compare service timecards and work orders to service schedule.
- Enter labor for each service technician
- Pull checks and charge slips and compare to invoices.
- Forward checks and payments to accounting.
- Happy calls / customer surveys.
- Other duties as given by Office Manager

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including billing, scheduling and renewals

Success Factors / Job Competencies:

- Customer Service – ability to service both internal and external clients with a high degree of satisfaction
- Organization – Ability to keep multiple schedules and projects organized and on schedule
- Commitment to company values
- Communication – Excellent interpersonal communication skills

Performance Indicators:

Certain key business indicators that will measure the effectiveness of the Service Dispatcher. These include the following:

- Degree to which unproductive labor or lost time is minimized
- Number of customer complaints due to scheduling.
- Number of return trips/call backs due to scheduling inefficiencies.
- Accuracy of customer history files.
- Filing of service orders.
- Accuracy of customer Maintenance Agreement files.
- Timeliness of billing information to accounting.
- Timeliness of warranty part processing.
- Follow up on pending or recommended work.
- Travel time goal = ¼ hour