

## **Description: Customer Service Affiliate II (CSA II)**

### **Summary**

The **CSA II** is an independent contractor that is authorized to conduct referrals and use the ODS to assess organizations.

### **Minimum Requirements**

The following are the minimum requirements of the position:

1. Twenty one (21) years old
2. Two (2) years of tertiary level training

### **Expectations**

As an independent contractor, the **CSA II** is responsible for his/her own work-related activities and does not give work-related reports to The Organizational Clinic. However, the following are some of the typical expectations of the affiliates:

#### Referrals

1. Conduct the referral process – provide accurate and adequate information about the products and services of The Organizational Clinic, and; ensure that the requisite referral paper-work is completed.

#### Use the ODS to Assess Organizations Independently

2. Establish the terms and conditions for each assessment-job with respective clients
3. Educate clients on the processes that occur during an assessment-job – including the sales process
4. Use the ODS to assess target organizations independently
5. Prepare report(s) with the findings of the ODS

#### Courtesy Support

6. Resolve customer complaints via phone, email or regular mail
7. Assist with orders, refunds, cancellations and exchanges
8. Provide information on warranties and terms of sale

### **Typical Steps of the Process**

1. Client contracts affiliate to conduct an assessment
2. Client completes and submits a Consultation Order Form to the Organizational Clinic
3. The Organizational Clinic issues a product key that allows the affiliate to use the ODS for the requested consultation
4. Upon completion of the consultation, affiliate prepares a report for the client
5. The Organizational Clinic reviews the used scale to ensure that it was administered satisfactorily, and; inspects the report to ensure that it meets the standard of the organization.
6. The Organizational Clinic issues a payment to the affiliate for the service
7. The Organizational Clinic mails a professional copy of the report to the client (or to the affiliate, if requested)