



LEAD CUSTOMER SERVICE REPRESENTATIVE

Job Status: Non-Exempt
Date Adopted: 07-2010
Date Modified: 03-16-2023

Safety Sensitive Position

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

Under general supervision, performs a variety of routine to routine to complex customer service functions, including providing information, researching problems, performing collections and making credit arrangements on customer accounts; answering customer inquiries and resolving complaints, receiving payments, issuing receipts, inputting data into the computer, and generating service orders. Performs switchboard operation and reception duties; receives and routes incoming calls to appropriate departments; signs in and directs visitors.

DISTINGUISHING CHARACTERISTICS

The Lead Customer Service Representative is the advanced journey working level classification. At this level, incumbents perform the most complex and specialized work tasks under only general supervision while exercising broader discretion and independent judgment within established guidelines.

SUPERVISION RECEIVED AND EXERCISED

Direct supervision is received from the Customer Service Supervisor and/or Customer Service Manager.

Technical or functional work direction is provided to Customer Service Representative I/II by the Lead Customer Service Representative.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS

Essential and other important responsibilities and duties may include, but are not limited to, the following:

Essential Functions:

1. Leads, coordinates, and oversees the work of Customer Service Staff.
2. Responds to customer requests in person or by telephone, mail, or email to initiate, add or terminate residential or commercial water service accounts; explains billing practices and rates; process turn-on and turn-off requests; and field work orders.
3. Maintains records of past due customer accounts; prepares delinquent bill reminders and past due notices; sets a date for service shut-off for non-payment; processes NSF checks and refers delinquent accounts to the collection agency in accordance with established District policy; reverse late fees and delinquent processing charges within authority levels, when warranted by the circumstances.
4. Research, analyze, and resolve the most complex and challenging customer service and billing issues. Communicates results verbally or in written format to the customer and others as needed.

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Essential Functions (continued):

5. Interpret customer accounts and apply knowledge of applicable Department rules and regulations to assist customers in resolving complex account-related problems.
6. Work directly with employees in other departments to resolve issues and improve work processes and communication.
7. Trains assigned staff and provides technical assistance as required. Recommends work methods, procedures, and techniques for customer resolution.
8. Provide the second level of customer service in person, via telephone, or other electronic means to customers not satisfied with the service provided.
9. Acts as a liaison between the public and/or employees and supervision/management in a professional manner.
10. Assist the Customer Service Supervisor and/or the Customer Service Manager with special projects and assignments.
11. Generates service orders for Field Service Technicians and makes a record of fieldwork completed; downloads and uploads information from hand-held meter reading devices into computer database and processes related reports.
12. Prepares and posts account, service, comment, and payment data to customer records by computer; process credit card payments request; assists in generating and preparing billing statements for mailing; reviews preliminary billing ledger reports prior to processing bills; performs nightly update.
13. Perform a wide variety of administrative tasks, including letter generation, memos, data entry, maintaining files, and sorting mail.
14. Cross trains to assist in billing and back-up other department staff as needed.
15. Direct calls to District staff; answers a broad range of general information questions about District programs and procedures. Assist visitors with the automated check-in process and authorize vendor access to the District campus.
16. Assist customers in registering and navigating the online payment portal, including assistance in autopay activation, paperless billing, budget bill, recurring payments, payment by text, and statement retrievable.
17. Assist customers in registering and navigating the online customer usage portal, including interpreting, analyzing, and educating customers regarding automated meter usage.
18. District employees are expected to work overtime, weekends, evenings, and holidays as required to accommodate the District's needs, in addition to responding as a Disaster Emergency Service Worker.
19. Regular attendance at the work site.

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Marginal Functions:

1. May be designated to act on behalf of the Customer Service Supervisor or the Customer Service Manager.
2. Provides informal input to the Customer Service Supervisor regarding staff performance.
3. Opens and closes the Administration buildings and turns the alarm system on and off.
4. Perform related duties and responsibilities as required.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

Modern principles and practices of providing good customer service.
Office procedures and methods.
Cash handling techniques.
Record-keeping procedures.
Basic accounting and mathematics.
Strategies for dealing with delinquent accounts.

Skill in:

Operating a personal computer and related software including basic level Microsoft, Word, Excel, MDM and other related databases.
Uploading and downloading information into a hand-held meter-reading device.

Ability to:

Provide tactful and courteous service to the public.
Resolve complaints in a calm and effective manner.
Perform mathematical calculations accurately and quickly.
Respond to requests for information from the public and other departments in an accurate and timely manner.
Explain District policies and procedures to customers.
Understand and carry out oral and written instructions.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain cooperative working relationships with those contacted in the course of work.
Maintain physical condition appropriate to the performance of assigned duties and responsibilities.
Maintain mental capacity, which allows the capability to make sound decisions and demonstrating intellectual capabilities.
Maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading, writing, and operating assigned equipment.

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REQUIRED QUALIFICATIONS

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge, skills, and abilities would be:

Job Title	Lead Customer Service Representative
Experience	<ul style="list-style-type: none">• Four (4) years of customer service work in billing, cashiering, or establishing and maintaining records of customer accounts with a public utility or equivalent.
Education/Training	<ul style="list-style-type: none">• Equivalent to a High School Diploma.
Desirable Degree/License/Certification	<ul style="list-style-type: none">• Valid DI.• Valid TI.• AWWA, Water Use Efficiency Practitioner Certification, Grade I.
DMV Class	<ul style="list-style-type: none">• Possession of a valid California Class C driver's license and a satisfactory driving record.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The physical demands and working environment demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment:

Standard office setting, including public counter and high telephone volume.

Physical:

Incumbents require sufficient mobility to work in an office setting; stand and sit for prolonged periods of time; operate office equipment including computer keyboard; light lifting and carrying; ability to verbally communicate to exchange information; use of hands repetitively to operate finger, handle or feel office equipment and reach with hands and arms. Employees are frequently required to stand and walk.

Mental:

While performing the duties of this class, an employee is regularly required to use written and oral communication skills, read and interpret complex data and information; use math and mathematical reasoning; analyze and solve problems; observe and interpret people and situations; learn and apply new information; perform highly detailed work on multiple, concurrent tasks; work with constant interruptions; interact with District managers and staff, customers who are often upset and dissatisfied, and the public.

Vision:

See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate assigned equipment.

Hearing:

Hear in normal audio range with or without correction.