

LEAD CUSTOMER SERVICE REPRESENTATIVE

*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; sign in and direct 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 may occasionally be 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. Responds to customer requests in person or by telephone, mail or fax 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.
2. Maintains records of past due customer accounts; prepares delinquent bill reminders and past due notices; sets date for service shut-off for non-payment; processes NSF checks and refers delinquent accounts to collection agency in accordance with established District policy; reverse late fees and delinquent processing charges within authority levels, when warranted by the circumstances.
3. 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.
4. 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.

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5. Perform a wide variety of administrative tasks including typing letters, memos, and data entry, maintain files, and sort mail.
6. Cross trains to assist in billing and back-up other department staff as needed.
7. Answers switchboard and direct calls to District staff; answers a broad range of general information questions about District programs and procedures.
8. Regular attendance at the work site.

Marginal Functions:

1. May be designated to act on behalf of the Customer Service Supervisor or the Customer Service Manager.
2. Opens and closes the Administration buildings and turns alarm system on and off.
3. Performs 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.
Techniques 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 of making 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

Experience and Training Guidelines

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

Experience/Training:

Four (4) years of progressive customer service experience in a public utility. Two (2) years of experience in a lead or supervisory capacity. Equivalent to completion of the twelfth grade. Completion of, either (a) nine semester units, or twelve quarter units of coursework in customer service principles, accounting, or computer technology at an accredited college or university, or (b) 120 contact hours of instruction in customer service principles, accounting, or computer technology at a recognized vocational or adult school, or the Southern California Water Training Consortium, (c) an equivalent program of instruction acceptable to the District, (d) an Associate or Bachelor's degree from an accredited college or university with major course work in business, public administration or a related field; OR an equivalent combination of education, training, and experience.

License:

Possession of a valid Class C California driver's license and a satisfactory driving record.

PHYSICAL DEMANDS AND WORKING CONDITIONS

The physical and mental demands described here are representative of those that must be met by employees 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.

Environmental Conditions:

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

Physical Conditions:

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 Demands:

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

JOB STATUS: Non-Exempt
DATE ADOPTED: July 2010
MODIFIED: January 2018
Safety Sensitive Position