



Customer Service Representative III

DEFINITION

Under general supervision, performs a variety of difficult and complex direct customer contact and office support activities, including supporting the servicing and maintenance of customer accounts for water service billing and collections; call center, customer service field functions, customer service office support, document reproduction service and mail center. Serves as the first point of contact for front-line customer escalations, works with the public in person and over the phone in a call center environment; completes related work as required.

DISTINGUISHING CHARACTERISTICS

Customer Service Representative III is the advanced specialist lead in the customer service series, fully capable of using independent judgment to perform the full range of customer service duties. Employees in the classification resolve difficult and complex customer service matters, account maintenance, billing and collection issues with minimal guidance. The incumbent provides instruction/training and work review to other Customer Service staff and performs as a lead worker on specific programs, projects and assignments.

EXAMPLES OF DUTIES

Typical duties may include but are not limited to the following:

- Serves as the subject matter expert and first point of contact for Customer Service Representatives, Customer Service Field Representatives and customer escalations.
- Performs difficult and complex water billing calculations, account maintenance, adjustments and reconciliations; authorizes and completes account adjustments and refunds following adopted policies and procedures.
- Interprets policies and procedures and exercises judgment to respond to the more complex and difficult customer inquiries, applications and complaints pertinent to billing, fees, rate structures, and District services; researches questions or problems and takes follow-up action as required.
- Prepares and reviews a variety of customer account records and correspondence for completeness and arithmetic accuracy; makes necessary corrections and takes further action as needed.
- Exercises independent judgment to make necessary corrections/updates on accounts, process applications and resolve problems that require detailed analysis, including handling escalations for the most challenging customer interactions.
- Researches account problems, evaluates alternatives and recommends or effects solutions to completion, coordinates solutions with other staff and departments as needed.
- Provides assistance to customers and staff, in person or over the telephone regarding billing, delinquent accounts, service notifications/investigations, District programs and other issues.
- Monitors the work of customer service staff to provide instruction regarding quality standards, accuracy, and adherence to general service levels.
- Supports Customer Service Representatives I/II and performs duties as needed to adhere to the general service level standards.
- Follows-up on delinquent accounts and returned checks; prepares appropriate correspondence and may contact the customer to effect collection.

- Recommends improvements to departmental policies and procedures to improve service effectiveness and staff resource allocation.
- Performs varied customer support work such as receiving and processing in person payments, mail, applications and electronic payments, balancing cash register and petty cash, verify and prepare cash shipments, maintaining files and accurately entering data into the automated customer relationship management system.
- Performs a variety of general office support work such as maintaining files and an inventory of office supplies, producing copies and mail operations; support of mail operations may include driving a District vehicle in the course of business, as assigned.
- Follows applicable safety rules and regulations.
- Performs related duties and responsibilities as assigned.

QUALIFICATIONS FOR EMPLOYMENT

Knowledge of:

- Policies and techniques for interacting with the public in person or over the phone, particularly in difficult situations;
- Policies and procedures related to the District and customer service work;
- Basic accounting principles related to customer service billing and payments;
- Standard office practices and procedures, including filing and the operation of standard office equipment and usage of customer relationship management software;
- Business letter writing and the standard format for typed materials;
- Recordkeeping principles and practices;
- Correct business English, including spelling, grammar and punctuation;
- Practices for providing instruction and work review to staff;
- Call center operations and software;

Ability to:

- Use a variety of standard office equipment and software, including a personal computer, calculator, copier/scanner, cash register, credit card machine and check endorser in the course of the work;
- Interpret, apply and explain complex policies and procedures;
- Provide instruction and work review to other staff members while maintaining positive working relationships;
- Make accurate mathematical calculations;
- Receive cash, make change and balance accounts;
- Type with sufficient speed and accuracy to enter data and produce standard correspondence;
- Perform detailed office support work;
- Maintain accurate customer accounting, office records and files;
- Prepare clear and concise reports, correspondence and other written materials;
- Use initiative and independent judgment within established procedural guidelines;
- Multi-task, organize own work, set priorities and meet deadlines;
- Work in a constantly changing environment with competing priorities;
- Establish and maintain effective working relationships with those contacted in the course of the work;
- Interact successfully with the public, in person and over the telephone;

Training and Experience: Any combination equivalent to experience and education that could likely provide the required knowledge and abilities would be qualifying. A typical way to obtain the knowledge and abilities would be:

- Graduation from high school;
and
- Two years of explaining policies and procedures to the public and maintaining customer accounts or similar records at a level equivalent to the District's class of Customer Service Representative II.

OTHER REQUIREMENTS

- Per California Government Code, Title 1, Division 4, Chapter 8, Section 3100 "all public employees are hereby declared to be disaster service workers subject to such disaster service activities as may be assigned to them by their superiors or by law."

PHYSICAL DEMANDS AND WORKING CONDITIONS

During the course of performing job duties the employee will need the mobility to work in a standard office setting, use standard office equipment such as a personal computer, word processing and data base software, calculator, a copy and/or fax machine; enter and retrieve data from personal computers and terminals via keyboards which is often performed while sitting for extended periods of time; operate office equipment requiring repetitive arm/hand movement and/or the coordinated movement of more than one limb simultaneously. The employee frequently stands, walks, bends at neck and waists, twists at neck and waist, uses repetitive hand movement, uses simple and power grasping with both hands, uses fine manipulation of both hands and fingers, and may require use of the arms above the shoulder, climb or balance; stoop, kneel or crouch. This position requires that the employee demonstrate adequate hearing and speech to converse in person and over the telephone, and vision to read printed materials and use a computer screen. The employee is occasionally required to lift and carry short distances objects such as reams of copier paper, office supplies, files, books, printed materials and other packages weighing up to 10 to 25 pounds.

The noise level in the work environment is quiet to moderate noise. Work schedules may be adjusted at times to accommodate operational needs and vacation coverage. Additionally, position may require the ability to work overtime and weekends as needed.

To be successful in this job, an individual must be able to satisfactorily perform each of the listed duties. These duties are representative of the knowledge, skill and/or ability required for the position. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties and functions of the position. Requests for reasonable accommodation should be directed to the Human Resources Manager.

Established: October 1986
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Approved by: Human Resources Manager