



## Customer Service Representative III

### **DEFINITION**

Under general supervision, performs a variety of difficult and complex direct customer contact and office support activities to include 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 class in the customer service series, fully capable of using independent judgement 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:

- Performs difficult and complex water billing calculations, account maintenance, adjustments and reconciliations; authorizes and completes account adjustments and refunds following adopted policies and procedures;
- Researches account problems, evaluates alternatives and recommends or effects solutions to completion, co-ordinates solutions with other staff and departments as needed;
- Provides assistance to customer service staff, regarding billing, service notifications/investigations and adjustment issues;
- Monitors the work of customer service staff to provide instruction regarding correctness, quality standards, accuracy, and adherence to general service levels;
- Assists customers, in person or over the telephone; answers inquiries and provides factual information regarding beginning or ending service; billing, payments, collections and related matters;
- Acts as subject matter expert and is the first point of contact for customer service representatives, customer service field representative questions and customer escalations;
- Supports Customer Service Representatives I/II and may perform duties on a relief basis or 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;

- Completes forms and prepares correspondence; proofreads typed materials for accuracy, compliance with policies and procedures, and correct English usage;
- Works with District staff regarding the need for field activities such as turning water service on and off, verification of meter serves/readings, referral for new meter service and water quality complaints;
- Recommends improvements to departmental policies and procedures to improve service effectiveness and staff resource allocation;
- Follows applicable safety rules and regulations;
- Uses 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;
- Performs varied customer support work such as receiving and processing in person, mail 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;

### **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;
- Record keeping 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:

- 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 account 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  
Revised: July 2017, February 2023  
Approved by: Human Resources Manager