



## **Customer Service Representative I and II**

### **DEFINITION**

Under general supervision, in a high volume call center environment, performs a variety of direct customer contact and office support activities supporting the servicing and maintenance of customer accounts for water service and billing; serves as a front-line customer support position working with the public in person and over the phone; processes requests for service; handles customer complaints; provides information; and performs related work as required.

### **DISTINGUISHING CHARACTERISTICS**

Customer Service Representative I is the entry level in this Customer Service class series in which individuals with developed office support and customer service skills learn policies and procedures and perform customer service duties related to the maintenance and processing of documents, payment for service and customer inquiries. Assignments are subject to frequent review while in progress and upon completion by the Customer Service Representative III or Customer Service Supervisor. There is limited latitude for independent judgment and action in well-defined areas of work. As experience and proficiency are gained, assignments become more varied and are performed under more general supervision.

Customer Service Representative II is the experienced level in this class series, able to perform the full range of customer service duties in a customer facing business office setting. Policies, procedures and general guidelines are followed, incumbents are fully competent, with a high level of accuracy, to exercise judgment in interpreting and explaining policies and procedures and in determining appropriate actions required to address more complex customer inquiries. There is some latitude for independent judgment and action in well-defined areas of work. This class is distinguished from Customer Service Representative III, which is the advanced specialist class that provides lead direction to Customer Service personnel and resolves more difficult customer service, billing and account support work.

Positions in the Customer Service Representative class series are flexibly staffed; positions at the Customer Service Representative II level are normally filled by advancement from the Customer Service Representative I level. Progression to the Customer Service Representative II level is dependent on (i) management affirmation that the position is performing the full range of duties assigned to the classification; (ii) satisfactory work performance; (iii) the incumbent meeting the minimum qualifications for the classification including any licenses and certifications; (iv) the incumbent satisfactorily meeting the internal promotional criteria; and (v) management approval for progression to the Customer Service Representative II level.

## **EXAMPLES OF DUTIES**

At both levels, typical duties may include but are not limited to the following:

- Performs various duties related to billing, including auditing bills, resolving billing errors, reviewing customer accounts for completeness and accuracy, entering and updating meter reads, and collaborating with field staff to confirm consumption amount and possible leaks; adjusts billings as appropriate.
- Obtains required customer information to process requests for start or discontinuance of water service(s); establishes deposit amounts from guidelines for new customers.
- Interprets policies and procedures and exercises judgment to respond to routine customer inquiries and complaints pertinent to billing, fees, rate structures, and District services; researches questions or problems and follows up as required or refers to appropriate personnel for resolution.
- Assists customers with online account setup and maintenance, troubleshoots user issues and resolves challenging customer interactions including the setup of payment plans and extensions.
- Receives customer payments, makes change, and issues receipts; opens and verifies customer payments received by mail; balances daily cash receipts, totals batches of checks received, and prepares bank deposit documents.
- Uses a computer system to process a high volume of service requests; posts payments; creates or updates master customer account billing records; creates service notifications and investigations for field personnel.
- Schedules and coordinates activities of field personnel relative to turn-off of service.
- Reviews a variety of customer account records and correspondence for completeness and arithmetic accuracy; makes necessary corrections or refers to appropriate personnel for further action.
- Researches, analyzes and updates electronic, automated and hard copy customer account records; sorts and scans a variety of customer documents according to a standardized filing system.
- Types information onto forms and prepares customer correspondence, follows office procedures; proofreads typed materials for accuracy, compliance with policies and procedures and correct use of the English language.
- Adheres to applicable safety rules and regulations.
- 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.
- Performs other duties as assigned.

*Positions at the Customer Service Representative I level may perform some of these duties and responsibilities in a learning capacity.*

- Receives and processes customer payments via electronic bank transfer; prepares bank deposit and end of day cash settlement.
- Follows-up on delinquent accounts and returned checks; prepares appropriate correspondence and may contact the customer by telephone, mail or via the internet to facilitate collection.
- Prepares periodic or special reports regarding customer service activities.
- May assist in the training of less experienced Customer Service Representatives.

## **QUALIFICATIONS FOR EMPLOYMENT**

The following Knowledge and Ability statements apply to both levels, however the Customer Service Representative I may build upon these skills at the entry level.

Knowledge of:

- Policies and techniques for interacting with the public in person or over the phone.
- Basic accounting principles related to customer service billing and payments.
- Standard office practices and procedures, record keeping, filing systems and the operation of standard office equipment.
- Correct use of business English, including spelling, grammar and punctuation;
- Call center experience.

Ability to:

- Use a variety of standard office and mail processing equipment including calculator, fax, scanner, and copier in the course of the work.
- Effectively and tactfully communicate with the public, in person, by telephone, mail, or via the internet; adapting communication style to suit different audiences.
- Maintain a positive, empathetic, and professional attitude toward customers at all times.
- Identify and assess customer needs to achieve satisfaction.
- Provide accurate, valid and complete information.
- Handle customer questions and complaints, provide appropriate solutions and alternatives; follow up to ensure resolution.
- Read, comprehend, learn, interpret and apply pertinent subject matter, procedures, precedents and policies related to the District and customer service work.
- Multi-task, organize own work, follow up, set priorities and meet deadlines to ensure positive outcomes and adherence to service levels.
- Ability to self-review work for thoroughness, accuracy and completeness.
- Ability to work with customers in person, in a constantly changing environment, and handle a high volume of calls with competing priorities.
- Simultaneously assist customers while monitoring various customer points of contact to ensure adherence to general service level standards.
- Effectively learn a variety of computer applications related to the work.
- Prepare clear, accurate and concise reports, correspondence and other written materials; keep accurate records of customer interactions and transactions.
- Use initiative and independent judgment within established procedural guidelines.
- Establish and maintain effective communication and working relationships with those contacted in the course of the work.
- Handle cash transactions and account reconciliation.
- Type with sufficient speed and accuracy to enter data and produce standard correspondence; perform detailed office work.

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:

- Customer Service Representative I: Graduation from high school and two years of office experience, which includes working directly with the public. Call center and or branch banking experience is highly desirable.

- Customer Service Representative II: In addition to the above, one year 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 I.

#### **INTERNAL PROMOTIONAL CRITERIA:**

- For non-competitive internal promotional criteria, please refer to the Flex Criteria Matrix for the applicable classification series.

#### **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, scanner, 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 uses a hands free headset while talking on the telephone. 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.*

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Approved by: Human Resources Manager