

SAN BERNARDINO MUNICIPAL WATER DEPARTMENT CLASSIFICATION SPECIFICATION

TITLE: CUSTOMER SERVICE LEAD REPRESENTATIVE

DATE: 7/1/2022

JOB CODE: 21736

FLSA STATUS: NON-EXEMPT

UNIT REPRESENTATION: GENERAL

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.

DUTIES SUMMARY

Under general supervision, to lead, guide and participate fully in the work of an assigned unit engaged in customer service and cashiering activities, perform the more complex and responsible clerical work of the customer service section; to train, instruct, and correct the work of assigned section members in the performance of specific tasks; and to perform related work as required.

DISTINGUISHING CHARACTERISTICS

The class of Customer Service Lead Representative is the advanced journey level in the customer service series. At this level, incumbents perform the most complex and specialized work tasks. Supervision is received from the Customer Service Supervisor, the Billing & Collection Supervisor, or the Administrative Services Manager.

EXAMPLES OF DUTIES

The following duties are typical essential duties for positions in this classification. Any single position may not perform all of these duties and/or may perform similar related duties not listed here:

- Provide courteous and expeditious customer service to the general public and City and Department staff;
- Routinely adhere to and maintain a positive attitude toward the City and Department;
- Answer the main telephone line and direct calls to Department staff as appropriate; answer a broad range of general information questions about Department programs, procedures, and policies;
- Serve as a counter representative or telephone representative, accepting applications for service, closing accounts, answering customer account inquiries, and providing routine changes to accounts within established standards and guidelines; provide a professional image to customers, co-workers, and other agencies;
- Research and resolve the most difficult and complex customer service and billing issues;
- Interpret customer accounts and apply knowledge of applicable Department rules and regulations in order to assist customers in resolving the more complex account related problems;

- Work directly with employees in other sections to resolve issues and to improve work processes and communication between and within sections;
- Train, guide, review, and correct the work of assigned staff, ensuring that accepted work methods are practiced;
- Calculate, collect fees, and process requests for new water and sewer services;
- Prepare clear and concise correspondence and advanced level spreadsheets for the most complex issues;
- Provide the second level of customer service in person, by telephone, or by other electronic means to customers not satisfied with services provided by lower level staff;
- Maintain receipts, records, tract maps, will serve letters, and databases pertaining to the collection of engineering new services development fees;
- Verify and balance work of Customer Service Representatives in Cashiering, balancing cash and researching documents to resolve discrepancies;
- Collect and processes and maintain records for night drop payments, electronic payments, and payments received from third parties;
- Balance cash and mail receipts to control figures;
- Disburse cash for cash drawers and provide change (coins and bills) to counter staff;
- Resolve all out of balance conditions;
- Prepare cash/checks for bank deposit; submit orders for cash deliveries;
- Assist in training or retraining staff in all aspects of customer service, cashiering, and billing and monitor and report on quality and quantity of work performed;
- Direct and monitor the work of subordinates engaged in telephone and over the counter customer inquiries, receipt of payments, establishment and termination of customer accounts, delinquency and non-payment processing, new construction/development, billing, adjustments, cash receipts, and service orders;
- Keep Customer Service Supervisor, or in the absence of the Customer Service Supervisor, the Billing & Collections Supervisor apprised of all assigned goals, significant work problems, and all staff complaints/compliments received from customers; make recommendations for effective problem resolution;
- Participate in interview and hiring/promotion processes and make recommendations;
- Communicate with existing and potential customers regarding various requirements, regulations, and charges related to water and sewer services, excessive usage issues, collection of overdue accounts, and concerns about rates, charges, and service;
- Assist supervision with workflow and business practices reviews and recommend changes and improvements as necessary; assist in developing improved work techniques and operating procedures; keep supervision apprised of all assigned goals, significant work problems, and staff complaints/compliments; make recommendations for effective problem resolution;
- Interpret and explain Department policies, procedures, and objectives to staff, ensuring adherence to same;

- Assist with the more responsible recording of payments for all Department sections and other payment centers through Cashiering; submit cash collection reports and materials to appropriate sections; review and approve balancing records; ensure balancing of cash and mail receipts to control figures;
- Coordinate with field service units with regard to daily work, including turn-ons, turn-offs, delinquency shut-offs, and field investigations;
- Issue daily schedules for lunch and break periods and other assignments as necessary according to staffing needs;
- Submit requests for order of equipment and supplies;
- Create spreadsheets with worksheet computations using formulas in Microsoft Excel;
- Read, understand, and apply difficult materials;
- Understand and carry out oral and written instructions;
- Maintain clear, concise, and accurate records and reports; prepare periodic and special reports; proofread and detect errors;
- Handle difficult public relations situations with patience, diplomacy, tact, and firmness;
- Make mathematical computations quickly and accurately;
- Act as a liaison between the public and/or employees and supervision/management in a professional manner;
- Assist the Customer Service Supervisor or Billing & Collections Supervisor with special projects and assignments;
- Act in the absence of the supervisor;
- Open and close the Customer Service office to the public;
- Cross train to assist in billing and back-up other Department staff as needed;
- Assist Supervisors in managing Records Retention per Department policy;
- Perform all of the duties of Customer Service Representatives I and II as required;
- Routinely adhere to and maintain a positive attitude toward City and Department goals;
- Perform related work as required.

QUALIFICATIONS

Any combination of education, training, and experience that would likely provide the knowledge, skills, and abilities to successfully perform in the position is qualifying. A typical combination includes:

Knowledge of:

- Water utility customer service procedures, practices, and regulations at an advanced level;
- Fundamental principles, practices, and techniques of maintaining customer accounts;

- Fundamental principles, practices, and techniques of public relations and customer service;
- Modern office equipment and procedures;
- Proper and correct English and Grammar usage;
- Basic legal procedures concerning a public utility;
- Business math;
- Accurate record keeping methods;
- Water utility customer service and cashiering policies, procedures, rules, and regulations;
- Utility billing and cash receipts system software;
- Call center telephone system software;
- County Parcel Ownership and mapping system software;
- Timekeeping software;
- Effective leadership and problem-solving methods;
- MS Word and Excel at an intermediate level;
- Appropriate safety precautions and procedures.

Ability to:

- Deal effectively with customers both in person, over the telephone, and via e-mail or other electronic means;
- Be tactful and courteous to the public;
- Interpret customer accounts, and explain Department rates, services, and policies;
- Deal effectively with irate customers and maintain composure while working under stress;
- Operate a keyboard accurately and 10-key calculator by touch;
- Enter and verify data; utilize computer system with advanced proficiency; update and maintain a variety of records;
- Analyze and evaluate data and make accurate and logical determinations based upon data and interpretive guidelines;
- Research and resolve the most difficult and complex customer service issues;
- Communicate clearly and concisely, orally and in writing;
- Prepare effective and concise business correspondence including letters and e-mails;
- Perform skilled work utilizing word processing, spreadsheets, and databases;
- Perform responsible work with considerable latitude for independent judgment;

- Operate standard office equipment, personal computers, and related customer service, billing, and cashiering software;
- Ability to troubleshoot minor problems with office equipment;
- Assign, check, correct, and participate fully in the work of subordinates;
- Schedule and supervise the workflow of subordinates;
- Assemble data and prepare accurate software reports as needed;
- Provide effective feedback on staff and work processes to reporting supervisor;
- Plan and schedule work assignments;
- Exercise good judgment, flexibility, and sensitivity in response to changing work situations and needs;
- Provide effective staff training;
- Establish and maintain positive and effective relationships with those contacted in the course of work;
- Keyboard at 30 WPM;
- Work under moderate to high stress conditions;
- Demonstrate proficiency in MS Word and Excel at an intermediate level;
- Maintain a driving record that meets vehicle code standards and is acceptable to the Department and its insurance carrier.

MINIMUM QUALIFICATIONS

Education: Graduation from high school or equivalent,
And

Experience: Four (4) years of progressively responsible public customer service work (i.e., customer service, billing, cashiering, or collections). Experience must be within the last seven years.

NECESSARY SPECIAL REQUIREMENTS

Depending on assignment, possession of a valid Class "C" California driver's license may be required. For out of state applicants, a valid Driver's License is required and a valid Class "C" driver's license must be obtained within ten (10) days of appointment (CA Vehicle Code 12505c).

PHYSICAL TASKS AND ENVIRONMENTAL CONDITIONS

Work involves exposure to potential physical harm, hazardous chemicals, and infectious disease. There is frequent need to stand, sit, stoop, walk, and perform other similar actions during the course of the workday. Employee accommodations for physical or mental disabilities will be considered on a case-by-case basis.

Incumbents require sufficient mobility to work in an office setting and operate office equipment, transport materials and supplies weighing up to 25 pounds, and to travel to various locations. Must be able to cope with moderate to high levels of stress. Must be able to see in the normal visual range with or without correction with vision sufficient to read small print, computer screens and other printed documents. Must be able to hear in the normal audio range with or without correction. Employee accommodations for physical or mental disabilities will be considered on a case-by-case basis.

CAREER LADDER

From: Customer Service Lead Representative

To: Customer Service Supervisor
Billing and Collections Supervisor

Job Description:

BOWC Approved:

Rev:

Rev with title change from CSR III

8/21/2007

11/14/2017

6/28/2022

Testing Standards: App Review/Supp App Review/Typing 30 WPM