



Customer Service Lead

Department/Division:	Customer Service
Reports To:	Customer Service Supervisor
Provides Direction To:	Not Applicable
FLSA Exemption Status:	Non-Exempt
Effective Date:	12/19/2024

GENERAL PURPOSE

Under general supervision from the Customer Service Supervisor, to serve as a Customer Service Lead in performing complex daily activities in support of the Customer Service division; to assist with overseeing the daily operations of the Customer Service function including cashing and payment processing; to ensure accuracy of accounts, timely processing, and efficiency through implementation of various technology solutions; to train and coordinate subordinate customer service personnel; to provide professional staff assistance in assigned administrative functions; and to perform related duties as required.

DISTINGUISHING CHARACTERISTICS

This class is the advanced-lead level in the Customer Service Representative series and is differentiated from the Customer Service Representative III in that incumbents are expected to work with greater independence and serve at a lead level. Incumbents lead, train, and monitor customer service staff and actively contribute to the planning, implementation, and assessment of division activities, services and programs. Incumbents perform complex technical Customer Service-related tasks and reports, handle difficult customer complaints and issues, and have responsibility for providing support and technical assistance to the Customer Service Supervisor.

ESSENTIAL FUNCTIONS

The duties and responsibilities listed below are intended to provide a representative list of the various types of work that may be performed. Specifications are not intended to reflect all duties performed within the job class, and incumbents may expect to perform other related similar duties.

- Leads and participates in a variety of complex technical Customer Service-related activities; trains and provides work direction and guidance to assigned personnel; assigns employee duties and reviews work for accuracy, completeness and compliance with established standards and procedures.
- Assists the Customer Supervisor with supervising the maintenance of customer account records and files; participates in handling the more difficult technical or sensitive public contacts.
- Assists the Customer Supervisor with overseeing and participating in processing customer accounts, preparing and recording changes in service, closing of accounts, completing new customer account information and closing of customer accounts.

- Assists the Customer Supervisor with overseeing and managing daily cash applications and reviewing customer payment plans. Assists the cashiers and the staff who prepare the daily deposits.
- Initiates programs that improve customer service.
- Posts, balances and reconciles accounts to the general ledger.
- Prepares a variety of regularly required reports; reviews documents, records and reports for accuracy, completeness and conformity to District standards.
- Researches, evaluates, recommends and participates in the implementation of technology solutions to streamline and improve existing processes related to customer and consumption information systems.
- Participates in all aspects of work related to computer operations; prepares regular and special reports.
- Participates in all upgrades and testing of hardware and software systems.
- Assists Customer Service Supervisor with coordinating implementation of new technology to enhance customer service capabilities; plans and develops timelines; obtains competitive pricing from vendors to ensure cost effectiveness.
- Perform a wide variety of administrative tasks including typing letters, memos, and data entry, maintain files, and sort mail.
- Assists Customer Service Supervisor with modifying, developing, and implementing policies and procedures as needed to meet the operational needs of the District.
- Researches assigned topics.
- Performs project management duties as needed to ensure successful project implementations.
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- Participates in employee selection and provides input into employee performance evaluation process as assigned.
- Assists with answering telephones, customer complaints and serving customers.
- Assist in the development and review of Customer Service division policies and standard operating procedures.
- Participates in District safety meetings.
- Maintain prompt and regular attendance.
- Performs other related duties, as assigned.

QUALIFICATIONS GUIDELINES

Knowledge of:

- Purpose, methods and practices of Customer Service and financial record keeping work.
- Principles of accounting, cashiering, internal controls, billing, collection methods, bank transactions and auditing.
- Principles of leadership, motivation and training.
- Business English, spelling and arithmetic.
- Pertinent federal, state and local laws, codes, regulations and ordinances affecting District operations and financial activities.
- Policies and procedures of the District.
- Application and utilization of information technology solutions in the maintenance of accounting, billing and financial records.
- Advanced database management and report writing.
- Application of various business solutions to enhance operational efficiency.
- Principles of business letter writing and basic report preparation.

- Modern office procedures, methods and equipment including computers.
- Telephone techniques and etiquette.
- Data control procedures and data entry operations.
- Research techniques, methods, and procedures.
- Personal computer operation and related software applications including intermediate level Microsoft Office, e-mail, and web-based communication tools.
- Safe work practices.
- Water use efficiency and conservation principles.

Ability to:

- Plan, coordinate and perform a wide variety of difficult and specialized Customer Service and accounting work related to the billing function.
- Analyze data; prepare and maintain accurate accounting records and files.
- Lead, train and provide work direction and guidance to assigned personnel.
- Use independent judgment in following through with instructions concerning the maintenance of financial records.
- Make mathematical calculations rapidly and accurately.
- Develop, interpret, apply and explain District policies and procedures related to Finance and Billing activities.
- Analyze problems; identify, recommend, and implement solutions.
- Manage projects and achieve established goals.
- Establish and maintain cooperative working relationships with others.
- Communicate clearly and concisely, both orally and in writing.
- Operate a vehicle observing legal and defensive driving practices.
- Operate standard office equipment, personal computers, Internet, and Microsoft Office software products.
- Answer telephones and be tactful and courteous to the public.
- Keyboard at 30 wpm and operate 10-key calculator touch.
- Observe proper safety precautions.

MINIMUM 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:

Education: An Associate degree from an accredited college or university in finance, accounting, business administration, information technology or a closely related field.

And

Experience: Four (4) years of progressively responsible professional experience in one of the following, customer service, cashiering, computerized billing and accounting related work.

Licenses, Certificates; Special Requirements:

Must possess an appropriate valid Class "C" Driver's License issued by the California State Department of Motor Vehicles, and a good driving record.

Possession of an AWWA Water Use Efficiency License is highly desirable.

Possession of a Grade I Water Distribution Operator's Certificate is highly desirable.

Possession of a Grade I Water Treatment Operator's Certificate is highly desirable.

Possession of a Cash Handler Certificate and/or CMRTA Certified Revenue Officer Certificate is highly desirable.

PHYSICAL AND MENTAL DEMANDS

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 functions.

While performing the duties of this classification, an incumbent is regularly required to use hands and fingers to handle or feel. The employee is frequently required to talk, hear, and to sit and reach with hands and arms. The employee is occasionally required to stand, walk, climb or balance and stoop, kneel, crouch or crawl. The employee must regularly lift and/or move up to twenty-five (25) pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus. Sensory demands include the ability to see within the normal range, talk, and hear, and use electronic touch keypads.

THIS POSITION MAY BE ELIMINATED, OR THE DUTIES, QUALIFICATIONS AND TRAINING REQUIRED CHANGED BY THE BOARD OF DIRECTORS AND/OR THE GENERAL MANAGER, WHEN IN THEIR JUDGEMENT, IT IS CONSIDERED NECESSARY AND PROPER FOR THE EFFICIENT OPERATION OF THE DISTRICT.