



Customer Service Supervisor

Department/Division:	Customer Service
Reports To:	Chief Financial Officer
Provides Direction To:	Customer Service Staff
FLSA Exemption Status:	Exempt
Effective Date:	12/19/2024

GENERAL PURPOSE

Under general supervision, to supervise the daily operations of the Customer Service function including cashiering, water conservation rebates, and payment processing; to ensure accuracy of accounts, timely processing, and efficiency through implementation of various technology solutions; to supervise, train and evaluate customer service personnel; to provide professional staff assistance in assigned administrative functions; and to perform related duties as required.

DISTINGUISHING CHARACTERISTICS

This is a supervisory-level classification for positions that supervise the daily operations, activities of the Customer Service unit for the District requiring advanced knowledge of the terminology, procedures and practices used in customer service. These roles schedule and supervise the daily work of an assigned team of staff, manage employee performance, train staff, develop, approve, and implement efficient work processes for their teams. These roles also assist management with developing procedures and policies involving billing and prepare and maintain documentation used for unit/team functions. Incumbents are expected to perform the full scope of customer service duties with minimum supervision and actively contribute to the planning, implementation, and assessment of departmental activities and programs. This class is distinguished from the executive-level Chief Financial Officer by the latter class's greater oversight and managerial responsibility of the District's Finance and related departments.

ESSENTIAL FUNCTIONS

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the class.

- Supervises the maintenance of customer account records and files; participates in handling the more difficult technical or sensitive public contacts.
- Supervises and participates in processing customer accounts, preparing and recording changes in service, closing of customer accounts, completing new customer account information and closing of customer accounts.
- Supervises and participates in issuing water conservation rebates.
- Oversees and manages daily cash applications.
- Supervises the Customer Service Representatives 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.

- Coordinates the preparation of a portion of the data and records for customer computer billings.
- 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.
- Schedules upgrades and testing of hardware and software systems.
- Coordinates implementation of new technology to enhance customer service capabilities; plans and develops timelines; obtains competitive pricing from vendors to ensure cost effectiveness.
- Provides and maintains access to internal computer systems for customer service representatives.
- Modifies, develops, and implements policies and procedures as needed to meet the operational needs of the District.
- Coordinates and collaborates with other functional departments to ensure the Customer Service Divisions' goals and objectives are properly aligned with those of the District.
- Researches assigned topics.
- Performs project management duties as needed to ensure successful project implementations.
- Participates in employee selection; trains and evaluates employees as assigned.
- Assists accounting and billing in absence of supervisor; assists with answering telephones, customer complaints and serving customers.
- 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 financial record keeping work.
- Principles of accounting, cashiering, internal controls, billing, collection methods, bank transactions and auditing.
- Principles of supervision, training and performance evaluation.
- 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.
- Safe work practices.

Ability to:

- Plan, coordinate and perform a wide variety of difficult and specialized professional accounting work related to the billing function.
- Analyze data; prepare and maintain accurate accounting records and files.
- Select, train and evaluate subordinate customer service 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; deal tactfully and courteously with the public.
- 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.
- 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: Bachelor's degree from an accredited college or university in finance, accounting, business administration, information technology or a closely related field.

And

Experience: Five (5) years of progressively responsible professional experience in a computerized billing and accounting customer service function for a governmental or special district agency of which at least two (2) years was at a lead or supervisory level.

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

PHYSICAL DEMANDS

The physical 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.