



# Customer Account Manager

## JOB SUMMARY:

Under general direction of the Chief Financial Officer, plans, organizes and coordinates revenue cycle and customer service operations of the North Tahoe Public Utility District (NTPUD) which includes Wastewater, Water, Recreation, Parks & Facilities Divisions, and internal customers; directs preparation and monitoring of billing statements; serves as liaison to Placer County Agencies for utility account outreach and tax roll information s; completes other related work as required.

## SUPERVISION RECEIVED/EXERCISED

This position is responsible for managing the Revenue Cycle and Customer Service functions and assigned team members. The Customer Account Manager reports to the Chief Financial Officer.

All positions assigned to this class require the ability to work independently exercising judgment and initiative and the ability to train others.

## EXAMPLES OF ESSENTIAL DUTIES:

- Provides leadership and works with staff to ensure a team-oriented work environment that supports achieving the department's and District's mission, vision, and values.
- Create and manage a high-quality work environment motivating team members to perform at their highest level and respond to employee relation issues expressed by team members, use appropriate judgment in upward communication regarding department and employee concerns.
- Participates in the recruiting and selection of customer service staff; evaluates and manages customer service staff.
- Manage, plan, cross-train, perform periodic audits, and provided secondary review of the work of Customer Service staff.
- Develop and manage training processes and ensure employees are trained in their areas of work in customer service and administrative and accounting functions, including a variety of clerical tasks, accounting functions, and administrative work in answering phones, receiving the public, providing customer assistance, cashiering, data processing, use of equipment, safety practices, and receiving materials and goods.

- Manage prioritization of workloads and provide daily direction and communication to employees so that customer service and administrative support services are handled in a timely, efficient and knowledgeable manner.
- Complete and provide formal performance evaluations and provide performance feedback and coaching on a regular basis to each team member, ensuring that employees have appropriate training and resources to perform their job duties.
- Mentor staff to develop and improve skill sets resulting in improved efficiencies, accuracy of customer account data and team cohesion.
- Plans, coordinates and monitors staff development and continuing education of customer service staff.
- Work with management to support public outreach communications for the District including creating content, proofreading information, and sharing letters, flyers, and website resources with staff and customers
- Respond to customer inquiries and requests expeditiously, utilizing a great deal of diplomacy.
- Manage administrative support requirements for all District departments and develop work procedures and processes that support the District's policies as needed.
- Works with Operations Department to coordinate task processes to ensure timely accurate customer account recognition and workflow.
- Manage counter plan review to reduce burden of plan checking by the Engineering Department and provide a quick turnaround for the customer.
- Assists customer representatives, departments managers, and staff by providing answers and information regarding specific account information, discrepancies, customer set-up/maintenance including meter setup; research issues regarding specific transactions; and updates related files and departments on action items.
- Manages Customer Service Representatives efforts to meet support needed by all departments.
- Develop and administer processes for utility billing, receipts, receivables, and customer service including creating master documents, templates, and reports to identify issues, document, and communicate with customers.
- Provide ongoing review of customer services department processes to identify opportunities for efficiencies and implement improvements as needed.
- Assesses, communicates, and enforces, District ordinances.
- Explains the District's programs, ordinances, policies, and procedures to the public.
- Plans, designs, and implements the utility revenue and process within the District and monitors results to the cost-of-service study.
- Manages utility billing processing, review, audits, and reconciliations on a timely basis. Evaluate billing technology and software used to recommend and implement potential process improvements.

- Analyzes utility billing data for varied uses including consumption trends and audits.
- Participates in a variety of accounting activities including account reconciliations, utility billing recognition, accounts receivable, and cash controls.
- Compilation and evaluation of month end and year-end reports, including monthly departmental report to CFO. Supports Accounting Department by timely process completion and preparing documents for month-end closing as needed.
- Assists external auditors during annual audits with compiling information and providing various reports and spreadsheets and answer their questions regarding revenue cycle and billing.
- Monitors revenue and receivable summary and detailed reports, internal/external reports, documents, studies and records for accuracy and proper account charges. Resolves discrepancies in a timely manner.
- Conducts data collection and preparation of reconciliation and internal audit reports.
- Oversee departmental records management systems, APN and other miscellaneous files; archives; and directories on district servers.
- Inputs and/or monitors employee time & pay records using an automated system. Ensures records are accurate each pay period.
- Prepares and monitors Customer Service Department budget line items.
- Prepares the determination and filing of lien process, and manages the application of liens to customer accounts.
- Assists with preparation of mandated reports to external agencies.
- Reviews County property reports for accuracy. Follows up on any unusual property transactions.
- Monitors collection status of utility billings and initiates appropriate collection measures when necessary.
- Participates in development of periodic Cost of Service Studies.
- Performs other duties as assigned.

<b>MINIMUM QUALIFICATIONS:</b>
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*Any Combination of education and/or experience that provides the required knowledge, skills, and abilities to perform the essential functions of the position. A typical combination includes:*

**EDUCATION AND EXPERIENCE:**

- A. Bachelor's Degree in Finance, Accounting or related field

B. 5-7 years managing revenue, expense, budget, and customer service matters in a public utility setting

KNOWLEDGE OF:

- Complex accounting functions and systems.
- Trends in California Special District accounting and billing operations with emphasis in Wastewater/Water system operations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- Principles and practices of employee supervision, including work planning, assignment review and evaluation, discipline, and the training of staff in work procedures.
- Principles and practices of leadership.
- Principles and practices of budget development and monitoring.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- High-level computer proficiency for word processing, spreadsheet and customer account applications.
- District and mandated safety rules, regulations, and protocols.
- Record-keeping principles and procedures.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and programs, project, and task coordination, including computers and software programs relevant to work performed.
- Applicable federal, state, and local laws, codes, and processes relevant to assigned areas of responsibility.

ABILITY TO:

- Select and supervise staff, provide training and development opportunities, ensure work is performed effectively, and evaluate performance in an objective and positive manner.
- Develop and implement customer service goals, objectives, practices, policies, procedures, and work standards.
- Identify problems, research and analyze relevant information, develop and present recommendations, and justification for solution.
- Read, analyze and interpret business periodicals, technical procedures or governmental regulations, prepare clear and concise reports, business correspondence and procedure manuals; effectively present information in one-on-one and small group situations to customers and employees of the organization.
- Interpret, apply, explain, and ensure compliance with District, federal, state, and local policies, procedures, laws, and regulations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.

- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted during work.

#### LICENSES AND CERTIFICATIONS:

- Possession of a valid driver's license along with a driving record acceptable to the District and the District's insurance carrier.

TOOLS AND EQUIPMENT USED:
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Modern office equipment such as use of personal computer, word processing, phone, calculator, copy machine, fax machine, and postage machine.

PHYSICAL DEMANDS:
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The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job in compliance with the Americans with Disabilities Act (ADA) requirements. Reasonable accommodations may be made, on a case-by-case basis, to enable individuals with disabilities to perform the essential functions.

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees will occasionally be required to lift and/or move 15-35 pounds and may need to carry for approximate distance up to 50 feet, bend, reach with hands and arms, use fingers to write or type and handle or feel, walk, carry documents, crouch, stoop, kneel, climb stairs, use of step ladder in lifting and lowering of documents. Long periods of looking at computer monitor.

ENVIRONMENTAL CONDITIONS:
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The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable

accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in enforcing departmental policies and procedures.