



## Customer Service Team Lead

### DEFINITION:

Under direction leads, oversees and participates in the work of the Customer Services Representatives responsible for providing customer service and administrative support for all departments.

### SUPERVISION RECEIVED AND EXERCISED:

Receives direction from the Customer Accounts Manager.

Provides technical and functional direction over the Customer Service Representative.

May provide technical and functional direction over other professional and technical personnel.

### CLASS CHARACTERISTICS:

The Customer Service Team Lead is the advanced journey level classification in the Customer Service series. In addition to duties herein, incumbents at this level are expected to perform the full range of duties as the Customer Service Representative II and distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, providing technical and functional direction over assigned staff and by the amount of time spent performing the duties. This class is distinguished from that of the Customer Service Representative series through its primary responsibility for prioritizing and leading a designated customer service and administrative support services assigned to tasks in that functional area.

### EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only):

*Reasonable accommodations may be made, on a case-by-case basis, to enable individuals with disabilities to perform the essential functions of the job.*

- Lead, plan, train, organize, review, and direct the work of Customer Service Representatives engaged in a variety of administrative tasks, accounting functions and customer service-related matters.

- Train assigned employees 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, bookkeeping, use of equipment, safety practices, and receiving materials and goods.
- Provide daily direction and communication to employees so that customer service and administrative support services are handled in a timely, efficient and knowledgeable manner.
- Provide feedback and coaching on a regular basis to each team member, ensuring that employees have appropriate training and resources to perform their job duties.
- Create and maintain a high-quality work environment so team members are motivated to perform at their highest level and respond to employee relation issues expressed by team members, using appropriate judgment in upward communication regarding department and employee concerns.
- Provide administrative support for all District departments and make recommendations for work procedures and processes that support the District's policies as needed.
- Engage in public outreach; respond to customer inquiries and requests expeditiously, utilizing a great deal of diplomacy.
- Assist Engineering Department in plan review to reduce burden of plan checking by the Engineering Department and provide a quick turnaround for the customer.
- Receives merchandise for District operations, scans receiving document into electronic folder and forwards receiving document to accounting.
- Processes customer payment batches; reviews and resolves discrepancies.
- Processes customer monthly automated payments, reviews and updates account information as needed.
- Creates or provides secondary review of entries and adjustments to customers' accounts including delinquent account fees and other account service fees.
- Runs delinquent customer reports for past due notifications and restrictions. Determines the dollar amount of tax liens to submit to the County annually; verifies property ownership and prepares adjustment forms for each account breaking out charges across service categories.
- Performs utility billing processing and reconciliations and resolves discrepancies.
- Manages temporary meter rental and meter reads, processes deposit payments and billing to customers.
- Assists customers, departments, and employees by providing answers and information regarding specific account information, discrepancies, and/or department specific issues and problems, customer set-up/maintenance and service rate changes including meter setup; researches issues regarding specific transactions; and updates related files and departments on action items.

- Issues equipment and clothing to new hires and replacements as needed; obtains necessary information for purchasing materials; maintains a log of clothing purchased for each eligible employee and the balance on his or her allowance account in accordance with District policy.
- Sets-up and revises vendor information in Accounts Payable module for compliance to ensure segregation of duties.
- Coordinates Customer Service Representatives in facilitating work needed by all departments.
- Perform other related duties as assigned.

MINIMUM QUALIFICATIONS:
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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: High School diploma, GED or recognized equivalent. Minimum of five (5) years of responsible experience in fields related to the position. Any equivalent combination of education and experience.

KNOWLEDGE OF:

- Current applicable software programs, office management techniques and budgeting principles and practices. Requires excellent organization skills and the ability to prioritize and meet deadlines.
- A variety of sources for equipment, materials, goods and services commonly used by the District.
- District procurement rules and regulations.
- General understanding of the District's methods and techniques for procuring and monitoring goods and services.
- Business arithmetic and basic financial techniques.
- Understanding of purchase order process.
- Record-keeping principles and procedures.
- District and mandated safety rules, regulations, and protocols.
- 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 program, project, and task coordination, including computers, software programs, copiers, fax machines, etc. relevant to work performed.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

ABILITY TO:

- Under limited direction, assume responsibility and make decisions related to administrative and customer services; plan, coordinate, and lead the work of

- support staff; analyze situations accurately and adopt effective courses of action.
- Coordinate, schedule and provide administrative support to various District departments as needed for absences, job vacancies, special projects or events, or peak times.
  - Assist with appeals, claims, public records requests, and other customer or public requests.
  - Provide information related to the use of District facilities and provide assistance with facility rentals; review issues with facility rentals with appropriate stakeholders.
  - Provide training to Customer Service Representatives as needed.
  - Engage in interpersonal communications, verbally and in writing with a diverse range of people, and maintain effective business relationships; identifying, analyzing, and independently solving a variety of moderately complex situations and problems.
  - Deal tactfully and courteously with the Board of Directors, District staff, customers and the general public; establish and maintain cooperative and effective working relationships.
  - Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
  - Establish and maintain a variety of filing, record-keeping, and tracking systems.
  - Understand and follow oral and written instructions.
  - Organize own work, set priorities, and meet critical time deadlines.
  - Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
  - 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 in the course of 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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District or personal vehicle (mileage reimbursable), personal computer, including word processing, spreadsheet, databases and other software which supports job duties, email, social media, telephone, fax machine and scanner, and copy machines.

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.

While performing the duties of this job, the employee is frequently required to sit, talk, hear, use keyboard, view monitor, and use phones. The employee 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.

Requires routine use of office machinery such as computer, copier, hole punch, binding machine, calculator, fax machine, and postage machine.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

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

While performing the duties of this job, the employee may occasionally be exposed to dust, noise, pollens, and fumes. Exposure to various weather conditions including snow, rain, freezing temperatures. The noise level in the work environment is usually quiet to moderate.