

LEAD CUSTOMER SERVICE REPRESENTATIVE

*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.*

SUMMARY DESCRIPTION

Under direction, leads, oversees, and participates in the more complex and difficult work of staff responsible for providing a variety of routine to difficult financial, statistical and accounting office support for general accounting, billing and cashiering functions; provides information and assistance to customers, the general public, and other City staff and departments; maintains files and records; and performs general office support duties, including typing and recordkeeping.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

1. Lead, plan, train, schedule and review the work of staff responsible for providing customer service functions and services; participate in performing the most complex work of the unit.
2. Train assigned employees in their areas of work including customer service related methods, procedures and techniques, software updates, new policies.
3. Provide first level response for escalated customer service issues.
4. Verify the work of assigned employees for accuracy, proper work methods, techniques, and compliance with applicable standards and specifications.
5. Perform a variety of responsible customer service, clerical accounting, and office support duties in support of assigned function or program area including in the areas of general accounting, utility billing and cashiering, backup to the Accounting Technician for billing.
6. Respond to inquiries, requests, and complaints in person or by phone; provide explanation of established procedures and policies of the work unit and/or designated program area; refer customers to appropriate personnel as necessary; start and stop services; solve customer issues and answer customer questions including billing questions.
7. Prepare, maintain, and/or verify a variety of accounting, financial, and statistical records, ledgers, logs, and files including customer account information files; review information for accuracy and completeness; resolve discrepancies and arrange for needed corrections; forward information to appropriate departments.
8. Create new utility customer accounts; obtain required information from customers to begin or discontinue water service; verify existing credit history information; receive customer payments and guaranteed deposits for service; issue receipts as necessary.
9. Process all monies received for the City whether by cash, check or bankcard; collect fees and other monies for various City services, issuing receipts, preparing deposits, and balancing accounts on a regular basis; extend payments for overdue bills within specified limits.
10. Create, print, process, and file service orders including shut off service orders for failed arrangement.

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11. Disburse and maintain petty cash records.
12. Provide double counts of cash for deposit at other departments as needed.
13. Perform a variety of general office support duties such as typing, proofreading, filing, answering the telephone and preparing periodic and special reports.
14. Ensure proper authorization and compliance with City policies and procedures.
15. Perform related duties as required.

QUALIFICATIONS

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

- Basic principles, procedures, and methods used in the performance of customer service and clerical accounting duties.
- Customer service techniques, practices, and principles.
- Principles of lead supervision and training.
- Financial recordkeeping and bookkeeping practices and procedures.
- Basic auditing principles and practices.
- Basic mathematical principles.
- Methods and techniques of proper phone etiquette.
- Principles and procedures of record keeping and filing.
- English usage, spelling, grammar and punctuation.
- Business letter writing and basic report preparation.
- Modern office procedures, methods, and equipment including computers.
- Computer applications such as word processing, spreadsheet, and database applications as well as financial and statistical software.
- Pertinent federal, state, and local laws, codes, and regulations.

Ability to:

- Lead, organize, and review the work of assigned staff.
- Independently perform the most difficult customer service duties.
- Perform a variety of customer services, clerical accounting, and office support duties and activities in support of assigned function.
- Prepare, maintain, and reconcile various financial, accounting, statistical and numerical records.
- Perform a variety of accounting, fiscal, and statistical record keeping duties
- Make accurate arithmetic calculations.
- Perform ten-key operations by touch.
- Understand and apply pertinent laws, codes, and regulations as well as organization and unit rules, policies, and procedures with good judgment.
- Implement and maintain filing systems.
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone or in person.
- Maintain composure and exercise good judgment when answering demanding questions.
- Utilize public relations techniques in responding to inquires and complaints.
- Prioritize work and coordinate several activities.
- Understand and carry out oral and written directions.
- Type and enter data at a speed necessary for successful job performance.

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- Operate and use modern office equipment including a computer and various software packages.
- Adapt to changing technologies and learn functionality of new equipment and systems.
- Use applicable office terminology, forms, documents, and procedures in the course of the work.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Education and Experience Guidelines

Lead Customer Service Representative

Education/Training:

Equivalent to the completion of the twelfth grade. Additional specialized training or college level course work in accounting, bookkeeping, business administration, or a related field is highly desirable; and

Experience:

Four (4) years of increasingly responsible customer service and clerical accounting experience including two years of experience comparable to that of a Customer Service Representative II in the City of Antioch.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

Environment: Work is performed primarily in a standard office setting.

Physical: Primary functions require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to occasionally stoop, bend, kneel, crouch, reach, and twist; to lift, carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; and to verbally communicate to exchange information.

FLSA: Non-Exempt

Created: May 2020

This class specification identifies the essential functions typically assigned to positions in this class. Other duties not described may be assigned to employees in order to meet changing business needs or staffing levels but will be reasonably related to an employee's position and qualifications. Other duties outside of an individual's skill level may also be assigned on a short term basis in order to provide job enrichment opportunities or to address emergency situations.