

CUSTOMER SERVICES SPECIALIST

Definition:

Under general supervision, to perform data analysis and reporting, provide customer service assistance and administrative support in the Customer Services Department.

Distinguishing Characteristics:

This is a single position, non-exempt classification. The position is distinguished from the Customer Service Representative series by the broader range of assigned duties and the level of data reporting activities performed by the incumbent. Responsibilities include auditing Agency water billing accounts, analyzing customer data, preparing monthly and ad hoc reports and providing general administrative support to the Customer Services Department. The incumbent in this position works inside an office environment; sits for long periods of time; occasionally lifts and carries up to 35 pounds; frequently uses a personal computer for long periods of time; frequently uses a telephone; and regularly meets with individuals and small groups to analyze and audit Customer Services data and practices, conduct training and provide customer service assistance.

Examples of Duties:

- Report and verify transactions processed through the Customer Service computerized software;
- review billing-related data produced by query reports;
- review new account setup and audit billing-related changes to maintain accuracy of billing accounts;
- perform data entry function to correct billing and related parcel information;
- track meter purchases and connections, developer projects and other related services;
- consolidate work activity reports and prepare monthly and annual administrative reports;
- research, analyze and compile statistical and technical data;
- prepare technical and statistical reports;
- assist in the training of new and existing Customer Services Representatives;
- analyze billing, payment and collection issues;
- perform complex billing calculations and processes;
- address and resolve customer questions, problems and concerns;
- provide general administrative support to the department;
- provide database management for files and records maintained by the department;

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- assist with the preparation and administration of the department budget;
- represent the Agency at meetings with other agencies;
- assist with the preparation of Board agenda items;
- perform related duties as required.

Qualifications:

Knowledge of:

- Modern office methods and practices;
- Agency software applications, including but not limited to, Word, Excel, Power Point and the current computer software utilized by the Agency;
- common billing and basic bookkeeping practices;
- principles of database management;
- principles of document management;
- basic statistical analysis;
- data analysis and reporting techniques.

Ability to:

- Prepare and maintain a variety of statistical and technical reports using COGNOS (report writer), HTE, Excel, Word, Access and other software programs;
- analyze data from the CIS regarding revenue, water consumption, fees and charges;
- use independent judgment and problem-solving to address and resolve customer problems, requests and/or concerns;
- interpret and utilize county parcel maps and Agency system maps;
- perform complex mathematical calculations quickly and accurately;
- represent the Agency in a positive and effective manner;
- interact cooperatively with customers and interest groups;
- speak effectively to small groups of people;
- communicate effectively both orally and in writing;
- analyze, compile and summarize technical and statistical data;
- prepare and deliver presentations summarizing data and highlighting trends;
- prepare PowerPoint presentations.

Education/Experience:

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Sufficient education, training and experience to demonstrate the knowledge and abilities listed above. These would normally be acquired by completion of an Associate's Degree in accounting, business administration or a closely related field and two (2) years' experience in utility billing, customer service or bookkeeping/accounting or an equivalent combination of education, training and experience.

License/Certificates:

Must possess and maintain a valid California driver's license with an acceptable driving record.