

## CUSTOMER SERVICE/BILLING SUPERVISOR

### DEFINITION

Under general ~~supervision~~direction, plans, organizes and supervises the workflow of the District Customer Service, Billing, and Meter Reading functions; provides direction and communication to direct reports and ensures that customer inquiries are answered in a timely, professional manner; audits and verifies completeness and accuracy of work; performs daily helpdesk and technical support and problem resolution to internal and external customers; reviews, develops and implements procedures relevant to the effective and efficient operation of the department; performs related work as required.

### SUPERVISION RECEIVED AND EXERCISED

General ~~supervision~~direction is given by the Director of Administrative Services~~Human Resources/Customer Relations Manager~~. Direct supervision of the Customer Service, Billing and Meter Reading staff is exercised.

### CLASS CHARACTERISTICS

This single position class oversees day-to-day operations and participates in all District activities required to ensure that District Customer Service, Billing and Meter Reading functions are executed professionally and efficiently. Incumbents are expected to perform all technical billing work, in addition to performing a variety of record keeping, reconciliation and report preparation activities. Incumbents will be required to work independently, use sound judgment and assist in the instruction of others. This class provides leadership, training and evaluation of work in addition to dealing with the more complex customer inquiries and billing problems.

### EXAMPLES OF DUTIES (Illustrative Only)

- ~~Assist~~Oversees the District's Customer Service, Billing, and Meter Reading functions and participates in troubleshooting problems that require special handling; ~~and~~ responds to customer inquiries and complaints in a courteous and effective manner.
- Provides continual evaluation of processes and procedures and ~~responsible for~~ suggesting/recommends methods to improve operations, efficiency and service to both internal and external customers.
- Maintains in-depth working knowledge of District's customer service systems and processes.
- Performs a wide variety of technical and complex customer service and billing duties, including setting customers up for automatic draft payments and direct debits, reviewing and processing daily remittance reports, approving Laserfiche batches, reviewing and approving past due notices and 24-hour door tags, reviewing and

approving customer finals and debit/credit adjustments, and related duties; performs all customer service and billing functions, as needed.

- Monthly customer refund deposits are one year of service.
- Reviews and approves weekly billing cycles.
- Works as a member/leader of special or on-going projects that are important to process improvement, such as customer service, billing, and/or technology upgrades.
- Monitors and provides performance feedback and coaching to assigned customer service and billing staff on a regular basis; writes and administers performance reviews for skill improvement and career development.
- Ensures that Customer Service, Billing, and Meter Reading staff has appropriate training, information, and resources to perform their jobs, including safety procedures, confidentiality and District policies.
- Establishes work procedures and processes that support the District's standards, procedures and strategic directives.
- Assists information technology and management staff with technology upgrades and other process improvements.
- Develops a variety of reports for the laboratory, operations and maintenance, and water conservation departments.
- Uses appropriate judgment in upward communication regarding department or employee concerns.
- Provides feedback to the Human Resources/Customer Relations Manager Finance Director—about any workflow problems or improvement opportunities with the Customer Service, Billing, and Meter Reading functions.
- Establishes and maintains effective working relationships with employees, other agencies and the public.
- Safeguards the confidentiality of employee and customer records.
- Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Practices and procedures related to accounting for receipts and the maintenance of customer accounts.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Standard office support practices and procedures, including the use of standard office equipment.
- Computer applications related to the work, including word processing and spreadsheet applications.
- Records management principles and practices.
- Business arithmetic and statistical techniques.
- Techniques for dealing effectively with the public, vendors, contractors and District staff, in person and over the telephone.

**Skill in Ability to:**

- Assist in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Supervise, select, train, motivate, and evaluate the work of staff.
- Plan, organize, administer, coordinate, review, evaluate, and personally participate in comprehensive public agency accounting functions.
- Prepare and maintain clear and accurate financial reports, correspondence, policies, procedures, and other written materials.
- Dealing courteously and tactfully with the public and others in providing information, answering questions and providing customer service.
- Responding to and effectively prioritizing multiple phone calls and other requests or interruptions.
- ~~➤ Attention to detail and organizational skills.~~
- Interpreting, applying and explaining policies and procedures.
- Composing correspondence independently or from brief instructions.
- Balancing cash receipts and maintaining accurate financial records.
- Establishing, maintaining and researching files.
- Making accurate arithmetic, financial and statistical computations.
- Using English effectively to communicate in person, over the telephone and in writing.
- Using initiative and independent judgment within established procedural guidelines.
- Organizing own work, setting priorities and meeting critical time deadlines.
- Entering and retrieving data from a computer with sufficient speed and accuracy to perform assigned work.
- Establishing and maintaining effective working relationships with those contacted in the course of the work.

**Education and Experience:**

To qualify, a successful incumbent must possess both education and experience, which would provide the required knowledge and abilities. Experience may substitute for education. Minimum requirements to obtain the requisite knowledge and abilities are:

**Education:**

Associate of Arts/Science with major coursework in business, accounting or related field.

Or

Five years of experience as a Customer Service Representative II may be substituted for the education requirements.

**Experience:**

Two years of experience in maintaining financial or accounting records, including dealing with the public and explaining procedures and regulations. At least one year of supervisory experience. Public sector experience desirable.

**License:**

~~Must possess a valid California class C driver's license and have a satisfactory driving record.~~ None[GK1].

**Physical Demands:**

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, 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 must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

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 interpreting and enforcing departmental policies and procedures.

**FLSA Status: Non-exempt, eligible for overtime**

**Bargaining Unit: MCWD Employees Association**[GK2]