



Marina Coast Water District

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LEAD CUSTOMER SERVICE / BILLING TECHNICIAN

DEFINITION

Under general supervision, provides lead direction and work instruction to assigned Customer Service/Billing staff performing duties related to the establishment and maintenance of customer accounts for water and wastewater services; prepares monthly utility billing; provides direct customer service associated with utility payments, requests for service, responding to complaints and providing information; performs a variety of technical tasks; provides administrative support to the Customer Service/Billing Supervisor; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

General supervision is given by the Customer Service/Billing Supervisor. Functional supervision may be provided by the Administrative Services Director or other managers. Exercises functional supervision and training to assigned staff.

CLASS CHARACTERISTICS

This is the advanced journey level class in the Customer Service/Billing Technician class series. Employees perform the difficult and responsible types of duties assigned to classifications within this series, including provision of technical and functional supervision and performance of advanced journey level activities. Employees at this level are required to be fully trained in all procedures related to assigned areas of responsibility. This class is distinguished from the Customer Service/Billing Technician II by increased level of responsibility assumed, complexity and sensitivity of duties assigned, independence of action taken and the nature of the public contacts. It is further distinguished from the Customer Service/Billing Supervisor in that the latter has overall responsibility for the Customer Service/Billing Department.

EXAMPLES OF DUTIES (Illustrative Only)

- Plans, prioritizes, leads, reviews, and participates in the work of staff involved in the performance of variety of technical duties related to the District's customer service/billing activities; develop schedules and methods to accomplish assignments ensuring all work is completed in a timely and efficient manner.
- Serves as the lead on technical integration and major projects.
- Participate in evaluating the activities of staff, recommending improvements and modifications.
- Design, develop, provide, or coordinate staff training; work with employees to correct deficiencies; document and maintain procedures and policies; develops training procedures, guides, and

manuals.

- Provides continual evaluation of processes and procedures and recommends methods to improve operations, efficiency, and service to both internal and external customers. Identifies system and workflow improvements to enhance customer service's team efficiency
- Responds and resolves escalated issues and/or unique complex requests from customers; investigate complaints or service improvements opportunities and recommends solutions.
- Assist customer service supervisor as needed on projects and daily tasks.
- Manage team metrics and goals.
- Operates computer billing system; processes field meter readings, identifying abnormal readings; sends out service requests for re-reads, leaks, or high usage; makes courtesy calls to customers with high usage and checks usage against prior month's usage; runs unread meter report; generates other reports; gets approval from supervisor and sends billing file to outside billing service for processing; prepares, audits, reviews and sends bills; maintains and reconciles a variety of customer billing records as directed.
- Receives customer payments by mail, check, cash, or credit card; processes mail payments, develops totals for cash drawer and check batches; takes in and distributes rebate forms; distributes and accepts appropriate forms; prepares bank deposit documents and end-of-day reports; scans documentation into computer system.
- Receives and dispatches work orders to field personnel, including service turn-ons, turn-offs, and customer complaints.
- Prepares correspondence relating to customer service activities.
- Assists in the preparation of special reports related to customer billing.
- Performs general office support duties such as opening and routing mail, preparing correspondence, maintaining an inventory of office supplies and stationery, and duplicating and distributing various written materials.
- May assist in the instruction and/or work review of less-experienced customer service staff.
- Performs other duties as assigned.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodation may be made to assist individuals with disabilities to perform the essential functions.

Knowledge of:

- > Principles and practices of technical and functional supervision.
- > Advanced customer service principles and problem resolution techniques.

- > Modern office practices and procedures.
- > English usage including grammar, spelling, and punctuation.
- > Standard office procedures, practices, and equipment
- > Basic cash handling practices and recordkeeping
- > Business arithmetic and statistical techniques
- > Computer applications related to the work, including word processing spreadsheets and database applications and data entry
- > Basic filing systems

Skills:

- > Provide information and answer questions calmly in stressful situations
- > Respond to and effectively prioritize multiple phone calls and other requests or interruptions
- > Interpret, apply, and explain policies and procedures
- > Compose correspondence independently or from brief instructions
- > Balance cash receipts
- > Organize own work, set priorities and meet critical time deadlines
- > Respond to customer inquiries and complaints in person or by telephone, provide information and solutions of billing issues, make billing arrangements, and represent the District in a professional and courteous manner

Abilities:

- > Provide technical and functional supervision over assigned staff; effectively train staff.
- > Make accurate arithmetic, financial and statistical computations
- > Receive customer payments in person or by mail; make change, issue receipts, balance cash, prepare deposit documents and end-of-day reports
- > Use English effectively to communicate in person, over the telephone and in writing
- > Exercise independent judgment and utilize initiative within established procedural guidelines
- > Accurately establish, maintain, and research files
- > Organize own work, set priorities, and meet critical time deadlines
- > Provide information and answer questions calmly in stressful situations
- > Establish and maintain effective working relationships and act in a courteous manner when interacting with the public, vendors, contractors, and District staff in person and over the telephone
- > Understand and follow written and oral instructions
- > Communicate information and policies clearly and concisely, both verbally and in writing

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:

Equivalent to high school graduate supplemented by business school or college level coursework in business and computer applications with two (2) years of customer service/billing support experience at a level equivalent to the District's classification of Customer Service/Billing Technician.

Licenses or Certifications:

None.

Physical Demands:

Must possess mobility to work in a standard office setting including standing, walking, sitting, kneeling, stooping, reaching overhead and below waist level. Use of 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