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City of Alameda  
Code No. 7565  
Approved by CSB:  
October 8, 2025

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## LEAD CUSTOMER SERVICE REPRESENTATIVE

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### **DEFINITION**

Under direction leads and performs a variety of difficult and/or complex administrative functions in support of customer accounts services and activities for business processes; performs other related work as required.

### **DISTINGUISHING FEATURES**

This class is the advanced working level classification in the class series. It is distinguished from Customer Service Representative by the performance of lead supervisory responsibilities in the absence of, or at the direction of, the Customer Services Supervisor or designee. Responsibilities may include making work assignments, training new and existing Customer Service Representatives, reviewing work in progress and work completed, and providing input to employee evaluations.

### **EXAMPLES OF DUTIES**

The following list of duties is intended only to describe the various types of work that may be performed and the level of technical complexity of the assignment(s) and is not intended to be an all-inclusive list of duties. The omission of a specific duty statement does not exclude it from the position if the work is consistent with the concept of the classification or is similar or closely related to another duty statement.

*Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.*

1. Performs assigned lead/supervisory duties, including receiving work schedules and assignments; monitors and participates in customer service and customer relations work related to customer accounts and services.
2. Performs all functions of a Customer Service Representative; handles the more complex and non-routine functions of the position.
3. Receives customer inquiries and complaints; provides information, explains policies and procedures, resolves complaints of complex issues and promotes the acceptance or adoption of products and/or services.
4. Trains, assigns, and monitors the work of Customer Service Representatives to ensure work is performed according to standards and guidelines; provides input regarding employee performance.
5. Participates in the development and implements rules, policies and procedures as required.
6. Coordinates various projects or activities and assists in the development of work methods, systems and procedures.
7. Provides lead direction and training; provides input into employee performance evaluations and recommends corrective actions; participates in employment selection activities.
8. Maintains a variety of records associated with the work, including daily work activities performed by dates, times and quantity; completes forms related to the work; provides reports of work status, customer contact, and employee performance.
9. Provide feedback from customer contact and service orders to supervisor(s) through various means such as reports, presentations, and other methods as appropriate.

Other Duties:

10. Performs related duties as assigned.

**WORKING CONDITIONS**

- Work is performed in an office or station environment.
- Occasional exposure to wet or humid conditions; extreme cold or extreme heat.
- Occasional exposure to fumes or airborne particles, and vibration.
- Noise level is usually moderate, ambient office sounds such as speaking, working office equipment, and software.
- Frequent public and customer interaction which may include interacting with upset customers, staff, and the public in interpreting and enforcing departmental policies and procedures.

**PHYSICAL DEMANDS**

- Sitting or standing for extended periods of time.
- Dexterity of hands and fingers to operate objects, controls, and/or tools such as but not limited to a computer, computer keyboard, and standard office equipment.
- Occasional lifting, pushing, or pulling of objects up to 25 pounds.
- Vision abilities or ability to interpret, read, and maintain various documents, such as files and reports, in electronic and non-electronic formats.
- Reach with hands and arms; repetitive movements of hands or wrist; climb or balance; stoop, crouch, squat, crawl, walk; twist and bend from the waist. .
- Hearing and speaking to present and exchange information and communicate in person and by telephone with customers and partners.

**EMPLOYMENT STANDARDS**

Any combination of education and experience likely to provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education: Graduation from high school supplemented by course work in customer relations, business, modern office practices or a related field.

Experience: Four years of increasingly responsible experience in customer relations, customer service, account billing and collections in a municipal or utility setting.

Knowledge

Knowledge of advanced customer service/relations theories, principles and practices and their application to department programs and/or services; business letter writing and basic report preparation; cashiering, routine delinquent account procedures, and billing calculation procedures; the principles and practices of automated financial record keeping; general accounting principles and terminology; modern office practices and procedures including applications of information systems; modern office equipment including personal computers; effective methods of lead and project supervision; effective methods of record keeping; correct English usage, including spelling, grammar and punctuation

Abilities

Ability to perform difficult and/or complex customer service and accounts administrative work, with speed and accuracy; effectively operate a variety of modern office equipment including computers and related software; interpret, apply and explain established policies and procedures; perform arithmetic calculations; work effectively under pressure and with frequent interruptions; listen, understand, retain, follow, apply, and communicate verbal and written instructions or directions; provide training and direction to assigned staff; monitor, and assess the work of assigned staff; establish and maintain records associated with the work; make accurate arithmetic calculations; establish and maintain effective working relationships with those

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NCW: Human Resources Department

[https://alamedacagov.sharepoint.com/teams/hr/Shared Documents/SPECS/Pending CSB Approval/2025 Meeting Specs/2025-10-08/Lead Customer Service Representative - Clean.docx](https://alamedacagov.sharepoint.com/teams/hr/Shared%20Documents/SPECS/Pending%20CSB%20Approval/2025%20Meeting%20Specs/2025-10-08/Lead%20Customer%20Service%20Representative%20-%20Clean.docx)

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contacted during the work; provide courteous and efficient service to customers and clients; learn, retain, and use technical terminology, equipment, and computer applications; ability to respond professionally and effectively to changing priorities; review and analyze processes, procedures, and policies and make effective recommendations for change; function independently and make decisions based on sound judgment affecting areas of responsibility within established guidelines and consistent with applicable law or code; perform related duties as required.