

## CUSTOMER SERVICE REPRESENTATIVE

### **DEFINITION**

Under general supervision, provides effective customer service for all customers by utilizing excellent, in-depth knowledge of the utility's programs and services. Performs information system recordkeeping work related to the operational, financial and commercial records of the electric utility. Performs other related work as required.

### **DISTINGUISHING FEATURES**

Positions in this class perform highly responsible customer service and may be responsible for specialized work. Incumbents are expected to have a thorough knowledge of and experience with multiple the information systems used at the utility to track and monitor electric use and charges (i.e., customer information system, external customer portal, meter data management, service orders, banking software, etc.) computerized customer information system as well as exhibit proficiency in a variety of additional functional areas. Examples of these functional areas include: cash handling, closed/active accounts collections and service order processing. Periodic adjustment of functional areas may occur to meet organizational needs. Actual responsibilities may vary according to assignment.

### **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. Promotes positive customer service relations through daily interactions with customers via telephone, email, mail, and face-to-face while displaying a positive attitude and work ethic.
2. Educates customers about the fundamentals and benefits of current and emerging programs and drives participation results.
3. Performs financial transactions including processing or transferring payments, adjusting charges and/or deposits, reversing payments, issuing refunds, processing bankruptcies and proof of claims, and working on customer payment programs.
4. Uses customer information system to enter data of utility customers and make data changes; coordinates with utility field and billing units, checks credit ratings, obtains other information to assist customers; resolves or refers to investigators reports of unauthorized utility usage and uses policy guidelines to determine deposit and restoration of service requirements.
- 4-5. Utilize multiple interfaces used for automated metering, electronic payments, and service orders; trouble shoots errors encountered by customers and works with system vendor to resolve escalated issues.
6. Handles delinquent receivables through non-pay work orders and bad debt collection work, including referrals to collection agency.
7. Process applications for affordability programs and ensures proper account set up.
8. Coordinate with customers to physically troubleshoot issues with AMI equipment.
- 5-9. Performs collection activities on delinquent accounts and processes write-offs.
- 6-10. Works as part of a team and collaborates with colleagues to reach customer service goals.
- 7-11. Maintains various manual records, logs and ledgers.
- 8-12. Researches customer records and interfaces with other divisions and departments to resolve more difficult customer inquiries and prepares correspondence.
9. May provide lead direction and training.

#### Other Duties:

13. May provide lead direction and training.

14.14-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.
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**EMPLOYMENT STANDARDS**

Education/Experience

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

Education: Graduation from high school.

Experience: Three years of responsible experience in heavy telephone or public contact, customer service, credit and collections, and program and service promotions.

Knowledge

Knowledge of customer service principles and processes; basic marketing concepts and methods, procedures, practices and terminology used in billing and financial record keeping work; and clerical accounting principles; computer applications such as word processing, spreadsheets, and customer databases; English usage, spelling, grammar and punctuation in a business environment; mathematical principles; modern office practices and procedures including applications of information systems; modern office equipment including personal computers; filing methods and systems.

Ability

Ability to communicate effectively with customers both in person, by mail, over the telephone and in email; understand

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pertinent procedures and functions quickly and use good judgment in interpreting and applying them to a variety of circumstances under general supervision; interpret, apply and explain established policies and procedures; market programs and services based on the customer's interests and needs; analyze and evaluate data; make accurate and logical determinations based upon data and interpretive guidelines; establish and maintain accurate records; speak clearly and concisely; operate a personal computer; simultaneously communicate with customers and accurately enter data into a computer; work effectively under pressure and with frequent interruptions; handle multiple priorities, organize workload and meet deadlines; communicate and collaborate with other departments as needed; work in a team-based environment to achieve common goals; perform arithmetic calculations; establish and maintain effective working relationships with employees and the general public; provide lead direction and training.

Typing Skill

Ability to type from clear printed copy at a speed of 45 net words per minute.

10-Key Skill

Ability to operate a 10-key calculator by touch.

Other Requirements

~~Selected positions require possession of a valid California Driver's License and satisfactory driving record as a condition of initial and continued employment.~~

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