



STEP ADVANCEMENT REQUIREMENTS

CUSTOMER SERVICE REPRESENTATIVE

STEP 1

The following are the skills and knowledge required to advance from Step 1 to Step 2.

1. Must read the Customer Service Procedure Manual and display a clear understanding of the Customer Service Objectives.
2. Must demonstrate a high level of dependability and cooperation, as well as provide excellent service to inside and outside customers, and display the following work skills:
 - A. Dependable, must arrive on time, not abuse break periods.
 - B. Efficient and accurate work habits in a high-paced environment.
 - C. Ability to prioritize work.
 - D. Strong cooperative skills within the Department and with other departments.
 - E. Consistent good judgment.
3. Must demonstrate dedication to District safety standards and Department goals.
4. Must have basic understanding of different rates and rate classes.
5. Must have working knowledge of and use the proper phone procedures, particularly the console for the proper handling of incoming calls.
6. Must have the ability to direct customers who come into the lobby to the proper department(s) and District meeting rooms.
7. Understand and use proper procedure for signing up a new customer for service. In addition, must have the ability to properly collect and account for the associated fees.
8. Must have knowledge of the different forms and computer paths used and be able to key in the pertinent data.
9. Must have the ability to receipt customer payments and display a high rate of accuracy and proficiency for handling cash transactions.

10. Must have the ability to balance assigned cash drawer, using established procedures. Must follow security provisions for handling cash at all times.
11. Complete orientation with the Water Department.
12. Must have basic knowledge of all customer information display screens on the computer.
13. Must become familiar with meter reading procedures in addition to the pertinent dates for making payment arrangements.
14. Be responsible for assigned work station. Must use proper procedures for logging off when vacating the work station or at the end of the shift.
15. Must have well developed oral and written communications skills and good listening skills.

STEP 2

The following are the skills and knowledge required to advance from Step 2 to Step 3.

1. Must display proficiency in all of the requirements as listed in Step 1.
2. Must be able to work well with less supervision.
3. Must understand District services available to customers, required but not limited to:
 - A. Budget Payment Plan set up and analysis process.
 - B. Discount Programs, how to set up, proper rates.
 - C. Be able to direct customers to the current available conservation programs, appropriate person or web page.
 - D. Native American tax-exempt process.
 - E. Green Power.
 - F. Assist customers to set up automatic payments.
4. Must have working knowledge of District credit policies.
5. Must have demonstrated a working knowledge of how all meters are read and billed.
6. Assist in handling the disconnects for non-pay. Must become familiar with the reports and alerts used in this process.
7. Must have knowledge of when to contact the Billing Department for account assistance and bill corrections.

8. Have working knowledge of creating service orders for construction connects and understanding the different forms and computer paths used for service work.
9. At least 1 day spent in the field with a Meter Technician.

STEP 3

The following are the skills and knowledge required to advance from Step 3 to Step 4.

1. Must display proficiency in all of the requirements as listed in Steps 1 and 2.
2. Must be able to prepare the daily office bank deposit.
3. Must understand and have the ability to prepare any necessary adjustments to customer accounts, whether debit or credit.
4. Must understand and have the ability to key in record changes as well as meter changes.
5. Must have a working knowledge for the handling of closing bills and the preparation of customer refunds, if appropriate.
6. Must understand procedures for handling collection problem active accounts.
7. Must understand the procedure for mailing out closing bills and reminder notices on finaled accounts. Must determine which accounts are to be sent to the collectors, and submit them to the Deputy Treasurer.
8. Must be able to work well with minimal supervision.
9. Must have the ability to work the other area offices when needed.
10. Complete orientation with Serviceman Representative.
11. Must be able to and be responsible for opening and closing of the office and vault, maintain kiosks as needed, and process drop boxes accurately.
12. Have working knowledge and proficiency in remittance processing.

STEP 4

The following are the skills and knowledge required to advance from Step 4 to Step 5.

1. Must display proficiency in all of the requirements as listed in Steps 1, 2, and 3.
2. Must be demonstrating the ability to efficiently perform all job functions with high accuracy.
3. Must be able to work well without supervision.
4. Must be able to train others in necessary job skills.
5. Must have the leadership ability to promote cooperation among coworkers and other departments.
6. Must have the ability and be willing to assume new projects.
7. Must be able to travel to outer offices and fill in as needed.
8. Must have working knowledge of all rate classes, water and wastewater accounts and the statements for same, and have the ability to relate necessary information to the customer in the absence of the Customer Services Supervisor.
9. Receive large power training.