



## Customer Services and Systems Manager

Class Code:  
122

### DEFINITION

Under administrative direction from the Director of Finance, provides leadership, plans, organizes, directs, and manages the customer service and meter reading sections and is responsible for all customer service, billing, customer information system, meter reading, field work, and collection activities. Through subordinate supervisors, leads, plans, schedules, directs, coordinates, and reviews the work of the office and field staff engaged in the maintenance and updating of customer accounting and billing records, meter reading and associated field activities, bill payments and collection processes, and customer relationship activities; prepares the annual division budget; provides strategic long term direction; performs complex analysis of customer service and meter reading statistics as the basis for performance improvements; designs and implements efficient business process improvements, and updates; improves policies and guidelines; understands, updates, and uses the customer information system to its maximum potential; ensures accurate cash reconciliations; implements strong internal controls for cash and data entry; trains and coaches employees; and performs related work as required.

### DISTINGUISHING CHARACTERISTICS

**Customer Services and Systems Manager** is a single-position, mid-manager classification. Under administrative direction, within a framework of overall goals and objectives, the incumbent is responsible for the direction, management, accuracy, and completeness of all customer service, billing, customer information system, meter reading, field and collection activities, development of strong internal controls, excellent customer relations programs and integration of a wide range of complex customer service, customer information system and meter reading and field activities including: managing the customer service and meter reading functions within legislative and District guidelines; strategic and long-range customer service and meter reading planning, optimal customer information system utilization, best practice bill payment options and cash management practices, financial and management analysis, and division business process and system reengineering studies. Responsibilities are broad in scope and require leadership and independent judgment on issues that are complex, interpretive and evaluative in nature.

This classification is distinguished from other managers within the District by the specific responsibility for managing the staff and activities of the customer service and meter reading sections. This classification is distinguished from the Manager of Finance in that the latter is a department head with overall responsibility for directing District-wide finance and related administrative support services and provides direction to this classification.

### TYPICAL DUTIES

#### **TYPICAL EXAMPLES OF DUTIES MAY INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING:**

- Responsible for the promptness, accuracy, and completeness of all work produced by customer service and meter reading personnel in all areas of responsibility including, but not limited to, cash collections, customer billings, service order processing, billing adjustments, cash reconciliations, meter reading, field work, field collections, customer information system updates, and customer care; ensures that customer information and

billing system is updated promptly each day with all daily changes and updates are not delayed.

- Understands, in depth, the software logic and use of the customer information and billing software system and recommends system configuration changes and/or modifications to improve performance or ease of use and to ensure the integrity of the system; understands and guides others on the logic of interfacing software and instructs them on how to reconcile financial data and transactions between software systems.
- Ensures compliance with District customer service, meter reading, collections, billing, rates, fees, charges policies, and guidelines; suggests and proactively makes improvements to policies and guidelines as needed.
- Develops and maintains strong cash and data internal controls to ensure the security and safety of each.
- Keeps current on pertinent federal and state laws that affect customer service, meter reading, and the District and ensures adherence.
- Researches industry best practices relative to water district customer service and meter reading operations; investigates new technologies that are beneficial to each area; proactively makes recommendations and develops and implements business improvements and/or new technologies to improve effectiveness and efficiency of the customer service and meter reading departments.
- Ensures that customer service and meter reading staff are fully trained to provide excellent customer service in the office and in the field; ensures that all staff provide excellent customer service in the performance of their daily responsibilities.
- Develops and produces pertinent monthly financial and statistical information for other departments or for internal use as required or as needed; proactively monitors monthly information for financial or other issues and communicates problem areas promptly to the department manager and proactively works through solutions to problem areas.
- Recommends business process changes to cross-functional management peers to achieve improved joint performance efficiencies; implements business process changes and measures performance.
- Participates in and supports District-wide initiatives and provides leadership and guidance when needed in the areas of customer service, billing, and meter reading.
- Interviews and hires new staff; plans and evaluates the performance of supervisors and staff; establishes performance requirements and personnel development targets; regularly monitors performance and provides coaching for performance improvement and ongoing development.
- Develops annual budget for the customer service and meter reading sections.
- Develops working knowledge of the functions of each division within the Finance department and how business processes and data flows are interrelated; assists the

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Manager of Finance in critically thinking through change issues and develops and implements plans for change as needed.

- Contributes to big picture, strategic thinking and applies this to short-term and long-term planning.
- Performs other related work as required.

### **REQUIREMENTS**

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

#### **Education and Experience:**

Possession of a Baccalaureate degree from an accredited college or university with a major in business management, communications, finance, or related field; and six (6) years of progressively responsible professional customer service management and business analytical experience using a computerized financial management system, including three (3) years of lead experience and completion of at least 75% of the District's Leadership Skills Training Program. Supervisory experience strongly desired. One (1) year of supervisory experience may substitute for completion of the District's Leadership Skills Training Program. Experience as a customer service and/or meter reading manager in a utility business is preferred but not required.

If not previously completed, completion of the District's Leadership Skills Training Program is required following hire.

#### **Knowledge, Skills, and Abilities:**

Knowledge of: effective principles, procedures, and methods used in customer service, customer accounting, utility billing, and meter reading; principles and practices of good customer relations and complaint resolution; modern principles and practices of effective employee supervision and personnel and program management; principles of effective leadership; ability to analyze, design, and develop effective and efficient business processes; current economic conditions and forecasting techniques; principles and practices of business process and financial analysis; cost estimating methods and principles and procedures of budget preparation, control, and administration; cash management techniques; electronic data processing principles relative to customer service, billing, and cashiering systems and the integration of data in an automated systems environment; pertinent state and federal laws and regulations applicable to the work of the division; financial record keeping principles and procedures; safe work practices and the ability to identify workplace hazards and/or unsafe conditions and take appropriate corrective action; modern office practices, methods, and computer equipment and applications related to the work, including word processing, database, and spreadsheet software.

Skill and Ability to: provide active leadership and effectively manage diverse customer service, customer accounting, billing and meter reading management functions; be a critical thinker that thinks outside the box and plans and implements change initiatives; advise department manager on customer service, billing, meter reading and customer accounting matters having departmental or District-wide impact; compile and analyze data; plan, assign, supervise and review the work of subordinate staff; interpret and explain computer generated customer service, billing, meter

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reading and customer accounting reports; understand and apply relevant laws and regulations; prepare clear and concise reports; perform the essential functions of the job without causing harm to self or others; operate modern office equipment and applications related to the work, including word processing, database, and spreadsheet software; communicate clearly and concisely, both orally and in writing; establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Additional Requirements:**

- Must possess a valid driver's license and have a satisfactory driving record.

**Working Conditions/Physical Requirements:**

The essential duties of this classification are performed in a controlled-temperature office and require the ability to: sit for extended periods of time in front of a computer screen; use finger dexterity and hand strength to perform simple grasping and fine manipulation; use a telephone, computer keyboard, 10-key calculator and other office equipment on a daily basis; speak and hear in person and on the phone; see sufficiently to perform assignments; frequently lift up to 20 pounds and occasionally up to 55 pounds; and intermittently twist to reach equipment or supplies surrounding desk.

Revised: 04/14, 02/21

Approved: \_\_\_\_\_  
Human Resources/Risk Manager