



Customer Service Representative

Purpose of the role:

Under general supervision, performs a variety of routine to complex customer service functions including providing information, researching problems, processing fees, receiving payments and issuing licenses and permits, by telephone and in person; acts as liaison between customers and staff; performs a variety of routine clerical support duties; and performs related duties as required.

Distinguishing Characteristics:

A Customer Service Representative serves as the first point of contact at a public counter and is responsible for determining the customer's needs and providing appropriate information or directing the customer to the appropriate area/individual for further assistance. Duties require a sound knowledge of departmental operations and, in particular, and understanding of planning and permit processing requirements. Incumbents may also provide assistance to Technicians or professional staff in assigned area to ensure customer needs are met in an efficient and timely manner. This class is distinguished from the Accounting/Customer Service Representative class in that the latter performs customer service functions requiring knowledge of accounting and billing procedures.

A Customer Service Representative is distinguished from other office and administrative support classes in that an incumbent in the former class spends significant time in direct customer interactions, by phone and in person, providing information and assistance that requires a sound working knowledge of the City's ordinance and Municipal Code requirements governing programs in assigned areas of responsibility and a high degree of customer service skill in dealing with customers who may be dissatisfied and/or upset.

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

Essential Duties and Responsibilities:

- Provides customer service by serving as first contact at a public counter; responds to various questions and inquiries regarding City services; researches and resolves problems in response to customer and staff requests.
- Receives and responds to requests for information within the area of assignment; directs incoming calls to appropriate staff; serves as liaison between customers, staff, City officials and other agencies.
- Processes public record requests including file and plan review, and written notification to architects, engineers, home owners associations and property owners for plan reproduction.

- Processes a variety of permits within area of assignment including residential electrical, plumbing, and mechanical permits; may issue routine permits; processing building permit and occupancy releases; provides assistance to customers in the review of planning applications; verifies information is accurate and complete; enters information into computerized application tracking system for plan check submittal.
- Receives and processes applications for various use permits; reviews permits received for accuracy and completeness; enters information into appropriate permit tracking system; maintains appropriate logs and records of permits received and recorded.
- Conducts investigations regarding violations of the City advertising ordinance; processes code violations; issues violations as generated by appropriate computer system.
- Receives payments and processes receipts for fees collected for various City services including transit cards, parking permits, special event parking, development fees and miscellaneous sales.
- Takes applications for use of City facilities; maintains and updates calendars for facilities usage; receives receipts and issues contracts for use.
- Creates and maintains a variety of logs and other records; conducts research on returned mail; data enters address and name changes; re-mails billings and correspondence.
- Performs a variety of general administrative and clerical duties in support of the department; maintains office supplies within assigned area; prepares correspondence and other written materials including typing, copying and faxing information as requested.
- Performs related duties as required.

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

***Desired
Minimum
Qualifications:***

Knowledge of:

- Methods and techniques of customer service.
- Methods and techniques of proper phone etiquette.
- Pertinent federal, state and local laws, codes and regulations relating to assigned area.
- Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
- Principles and procedures of record keeping and filing.
- English usage, spelling, grammar, and punctuation.

Ability to:

- Perform a customer service work of a general nature involving the use of independent judgment and personal initiative.
- Use tact, discretion, patience and understanding in dealing with

customers and the public.

- Quickly, efficiently and calmly handle a high volume of customer interactions by telephone and in person.
- Interpret, explain and apply complex City and state laws and regulations related to assigned areas of responsibility.
- Interpret and apply administrative and departmental policies and procedures.
- Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.
- Understand and carry out written and oral instructions.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Respond and perform assigned duties in the event of a City-declared emergency.

Competencies:

- Results Oriented
- Customer Focused
- Flexible/Adaptable
- Problem Solver and Decision Maker
- Planner and Organizer
- Technically Knowledgeable

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

Education/Training:

Equivalent to the completion of the twelfth grade.

**Education and
Experience
Guidelines:**

Experience:

Two years of office administrative or customer service experience.

Licenses; Certificates; Special Requirements:

A valid Class C California driver's license.

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

**Physical and
Environmental
Conditions:**

Physical: Sufficient physical ability to work in an office setting; sit, stand, walk, reach, twist, turn, kneel, bend, squat, and/or stoop for prolonged periods of time; perform duties requiring grasping, repetitive hand movement, and fine coordination; and operate office equipment. **Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate office equipment. **Hearing:** Hear in the normal audio range with or without correction.

Environment: Standard office setting.

Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.

Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.

Date Adopted: 7/5/03

Date Revised: