SOUTH COAST WATER DISTRICT

DATA ANALYST/CUSTOMER SERVICE TECHNICIAN

DEFINITION

This position is located in the Customer Service Division of the Finance Department and performs a variety of analysis, design, and development duties related to the establishment and maintenance of computer based business reports for use in maintaining and improving service delivery in the areas of customer service and billing; provides direct customer service associated with utility payments, requests for service, responding to complaints and providing information; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

This position reports to the Customer Service Manager. No supervision of staff is exercised. May exercise technical and functional direction over lower-level staff.

CLASS CHARACTERISTICS

This is an experienced-level class within the customer service technician series with specific technical knowledge and responsibilities related to designing and developing reporting of customer account and billing information. Incumbents are expected to perform a wide variety of customer service duties and are required to work independently and use sound judgment. The work requires the application and interpretation of policies, procedures, and regulations and involves frequent contact with the public. This class is distinguished from the Customer Service Technician II in that it is a higher-level class in the series requiring more specialized knowledge, skills, and training, and performs more technical customer service support duties requiring specific experience in working with databases and generating technical reports.

The incumbent ensures that her/his activities are aligned with and support the South Coast Water District’s policies, mission, vision, core values, core strategies, and annual action items as well as performance measures.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS

Duties may include, but are not limited to, the following:

- Develops and implements automated processes, scripts, triggers, specialized views and reports in response to District and division needs.
- Designs methods to import/export data from the District’s customer billing systems for analysis and performs comparative analysis of data.
- Creates methods to expedite the access and retrieval of data, and develops processes for quality control of databases or database management systems.
- Develops and implements specialized views and reports in response to District and division needs.
- Troubleshoots and/or resolves basic software problems to ensure the continued use of mission critical divisional applications.
- Reports software failures to IT personnel and/or the appropriate vendors via telephone or on-line systems.
- Responds to customer inquiries and complaints in person or by telephone and provides information; provides for the resolution of unusual billing and customer cost situations by conducting appropriate research; and represents the District to callers and visitors in a professional and customer friendly manner.
- Receives and screens visitors and telephone calls; takes messages, directs the caller to the proper office or person, and/or provides factual information or problem resolution regarding District and departmental activities and functions that requires the application and explanation of rules, policies, and procedures.
- Interprets policies and procedures and explains service fees, rates, and procedures to customers; may waive fees under appropriate circumstances.
 Receives and processes service requests, sets up new accounts, determines and collects necessary charges and secures legal documents regarding property descriptions and ownership.
 Makes billing arrangements for new accounts and prepares closing bills for canceled service, including verification of deeded ownership changes.
 Operates computer billing systems; edits, prepares, and sends bills; maintains and reconciles a variety of customer billing records as directed; estimates proper billing amounts and makes appropriate adjustments ensuring proper billing codes.
 Receives customer payments in person, via District website, or by mail; makes change and issues receipts; balances cash receipts, processes mail payments, develops totals, prepares deposit documents and end-of-day reports, and delivers daily bank deposits.
 Resolves issues and problems regarding the processing of orders and delinquent accounts.
 Prepares correspondence relating to customer service activities.
 Assists in the preparation of special reports related to customer billing.
 Operates standard office equipment, including job-related computer hardware and software applications, facsimile equipment and multi-line telephones; and may operate a two-way radio.
 Performs project research and report preparation, technical reports and other technical work related to District activities.
 Drafts and types correspondence, reports, forms, invitations, graphic materials, and specialized documents; and proofs materials for accuracy, completeness, compliance with District policies, format and English usage, including grammar, punctuation, and spelling.
 Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:
 Modern principles and practices of computer systems management, analysis, design, database structures and relationships, script writing, documentation, and maintenance.
 Various software packages including word processing, spreadsheet, Microsoft SQL database and database management, reporting tools, graphics and desktop publishing applications and programs.
 Data management theory, principles, techniques, and practices and their application to a wide variety of services and programs.
 Practices and procedures related to accounting for receipts and the maintenance of customer accounts.
 Codes, regulations, policies, and procedures related to the customer service department.
 Business arithmetic and basic statistical techniques.
 Basic business letter writing and the standard format for reports and correspondence.
 Record keeping principles and procedures.
 Standard office support practices and procedures, including the use of standard office equipment.
 Computer applications related to the work.
 English usage, grammar, spelling, vocabulary, and punctuation.
 Techniques for dealing effectively with the public, vendors, contractors and District staff, in person and over the telephone.
 Techniques for providing a high level of customer service to public and District staff, in person and over the telephone.

Ability to:
 Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
 Deal tactfully with the public and others in providing information, answering questions, and providing customer service.
 Respond to and effectively prioritize multiple phone calls and other requests or interruptions.
 Compose correspondence independently or from brief instructions.
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- Balance cash receipts and maintain accurate financial records.
- Make accurate arithmetic, financial, and statistical computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Interpret and implement policies, procedures, and technical processes.
- Maintain detailed and accurate records.
- Organize own work, set priorities and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone and in writing.
- Use tact, initiative, prudence and independent judgment within general policy, procedural and legal guidelines.
- Establish and maintain effective working relationships with those contacted in the course of the work.

**EXPERIENCE AND TRAINING GUIDELINES**

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

**Experience:**

Four (4) years of progressively responsible experience in technical report writing, SQL scripting, database design and management, customer service, or the maintenance of financial and accounting records.

**Training:**

Bachelor’s degree in computer science, information technology, business administration, or a related field.

**License or Certificate:**

Valid California class C driver’s license with satisfactory driving record.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard, typewriter keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

*The specific statements shown in each section of this classification description are not intended to be all-inclusive. They represent the essential functions and minimum qualifications necessary to successfully perform the assigned functions. Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*