



## UNION JOB DESCRIPTION

### TITLE: Business Services Representative

#### DEFINITION:

Works as part of the Business Services team to communicate with and provide information to the District's commercial and industrial customers (residential customers as required) to ensure customers receive courteous, prompt and efficient service. Promotes energy efficiency programs and other customer service solutions.

#### DISTINGUISHING CHARACTERISTICS:

This position is distinguished from the Customer Service Representative in that it is a bid position. This position works as an inside representative in support of the District's Business Services Account Managers and Executive Account Managers by serving any Commercial & Industrial customers, with specific responsibility for the "small" Commercial & Industrial customers. This position is also required to perform residential call center duties as needed in addition to duties outlined in this job description.

#### BASIC RESPONSIBILITIES:

1. Responds to all commercial and industrial customer inquiries and resolves complaints by effectively using human relations skills and being knowledgeable of current District policies and utility industry conditions through information provided by the District especially as they pertain to the Commercial & Industrial customer.
2. Works as a member of the Business Services team by serving Commercial & Industrial customers and responding to energy efficiency programs inquiries. Supports the Business Services team (e.g., Account Managers, Executive Account Managers, Energy Efficiency Engineers, etc.) by serving and responding to inquiries from customers. Builds relationship with Commercial & Industrial customers by initiating calls (for such things as providing various program information, upcoming outage information, etc.) and doing follow-up calls as required. May visit customer sites to gain an understanding of the Commercial & Industrial customers business.
3. Proactively promotes energy efficiency programs and services and other customer service solutions by providing information, referrals and follow-up discussion.
4. Organizes and prepares outgoing correspondence. Responds to and coordinates all activities regarding incoming Commercial & Industrial customer correspondence.
5. Coordinates and works with appropriate Customer Service Representatives and/or Customer Service Managers to facilitate the processing of business transactions relating to commercial and industrial customer accounts, such as, but not limited to:
  - Liaison contact for processing bankrupt accounts
  - Liaison contact for evaluating deposit requirements
  - Resolving payment problems through payment arrangements
  - Coordinating high bill inquiries
  - Opening and closing customer accounts
  - Liaison contact for Owner/Agent Agreements
  - Evaluating collection requirements on past-due accounts
6. Initiates, coordinates and follows-up on miscellaneous service requests. Creates, maintains and processes spreadsheets, customer letters, forms, templates and other documents as needed in support of Business Services.
7. Coordinates the correction of misbilled accounts.
8. Performs all duties of a Call Center Customer Service Rep as required.

#### BASIC RESPONSIBILITIES: (continued)

9. Responds to District needs during outages.
10. Interacts with outside agencies regarding customer accounts.
11. Provides input in preparing and updating procedures.
12. Performs various audit and evaluation functions as required.
13. Maintains statistical data and prepares various reports as required.

#### OTHER RESPONSIBILITIES:

1. Represents the District in hearings and court appearances.
2. Maintains knowledge of various District procedures, customer programs, policies and CIS and other programs to assist C&I customers, (e.g., FieldView, OMS II, Crew Log, etc.).
3. Maintains knowledge on District Rate Schedules and other fees.
4. Performs associated duties as assigned.

\* Exceptionally good is defined as a person who has the following characteristics: Uses good judgment, listening skills, is positive, cooperates, treats people with dignity and respect, sees tasks through to completion, and has a willingness to help others.

#### MINIMUM QUALIFICATIONS:

##### Knowledge of:

- Advanced customer relations techniques; including dealing with difficult customers.
- District's rate schedules and other fees.
- Load profile data and how it is collected and maintained.
- Bills and billing elements (e.g., Power Factor, kW demand, etc.).
- District procedures, customer programs, policies and CIS.
- Customer service computer applications at intermediate to advanced level.
- Corporate enterprise systems at intermediate to advanced level; e.g., email/calendaring, word processing, spreadsheet.
- Analytical and problem solving techniques.
- Basic math and bookkeeping and/or accounting principles.

##### Ability to:

- Effectively interact verbally and in writing with customers, outside governmental agencies, and District employees.
- Apply exceptionally good\* human relations skills in various customer situations.
- Use computer and related software/systems for daily work.
- Learn commercial rate schedules.
- Learn energy conservation/renewable/demand response, etc. offerings, timelines, payment processes, rebates, measures.
- Learn energy conservation/renewable/demand response, etc. contracts and contractual requirements.
- Learn conservation language and best practices.
- Learn District conservation marketing campaigns, events, conferences.
- Work and perform effectively in a fast paced environment.
- Work in a team environment and as an effective team member with strong commercial/industrial customer focus.

- Learn to use/maintain customer interactions in enterprise or Customer Relationship Management (CRM) tool.
- Use independent and discretionary judgement.
- Word-process/keyboard at 35 words per minute.
- Handle confidential material.
- Effectively manage and prioritize simultaneous assignments and tasks.

Education/Experience:

- High school graduate or equivalent.
- Certified as Level 2 Customer Service Representative with eighteen (18) months Customer Service Representative experience.

License or Certification:

- Valid Washington State Driver's License.
- Successful completion of a written and verbal communication skills exercise test.
- Successful completion of a word/excel skills exercise test.
- Successful completion of an interview process.
- District's Basic Electricity course (if not completed by start of job, must take next time District offers).

WORKING CONDITIONS:

- Work is performed in an office environment.
- May require travel to meetings, training, customer sites, trade shows/conferences, etc.
- Incumbents perform repetitive movements from use of a computer and mouse.
- Frequent contact with the general public.
- Position is subject to seven days a week and 24-hour call out for emergency situations.