

Job Title: Commercial Account Specialist

Department: Customer Service

Location: Main Office

Reports To: Customer Service Supervisor (Applications)

Job Status: Full-Time

Pay Status: Non-Exempt

Job Grade: 203

Date Created / Updated: 11/25/2024

Position Summary

The Commercial Account Specialist (CAS) is responsible for assisting with all commercial services, elevated customer concerns, day to day activities, and performs a variety of complex administrative work within the customer service department. This position requires a high degree of independent judgment and interpretive ability related to technical knowledge of utility billing, customer service procedures and policies.

The CAS is responsible for the administration of complicated customer commercial service related issues, handling complaints, researching problems, making account adjustments or corrections, and performs other duties as assigned. The position reports to a designated supervisor and works under limited supervision.

The Commercial Account Specialist's primary purpose is to be the main point of contact, understand, communicate and satisfy our customer's needs. The representative acts with a sense of urgency, is solution-oriented, approachable, professional and takes great pride in working with customers to deliver an experience that meets and, at times, exceeds their expectations. Excellent time management, listening skills, attention to detail, accuracy, adaptability and stress management skills are essential.

Essential Duties and Responsibilities

COMMERCIAL ACCOUNTS

- Responsible for handling all commercial customer email inquiries and requests received through the Customer Service email
- Maintain strict confidentiality of business, employee and customer information in written and oral communications and safeguard sensitive documents
- Calculates and quotes appropriate deposit amount for location; collects deposit payment
- Processes all commercial documentation received via in person, fax or email
- Processes the initiation, disconnect and transfer of service requests
- Researches CIS system to confirm if applicant has any past account balances. If outstanding balance is found, sets up payment arrangement and forwards to Collections Representative.
- Verifies and researches customer account information and history to explain services, policies, analyze charges and usage, and adjustments using various database and software applications
- Processes corrections to customer accounts
- Extracts data from various software applications and creates reports in a timely manner
- Logs customer complaints and maintain customer account information in the CIS system including the details of every interaction handled
- Schedule all commercial field orders/service requests and coordinate work requests with appropriate departments and NBU staff
- Offer solutions and solve problems that are sometimes unstructured and that may require reliance on conceptual thinking.
- Collect Tax Exemption certificates, ensure customer account(s) are properly coded and process any credits as required
- Focuses on customer satisfaction and delivers a quality service or product to the agreed standards

COMMUNICATION

- Demonstrates effective oral and written communication skills with peers, employees, superiors, and

appropriate entities.

- Communicates with Engineering teams to determine availability of services, fees and deposits
- Assist customers in navigating through the NBU website and with setting them up to access their online accounts
- Explain additional services and programs available such as: Auto draft, Budget Billing, Home Assessments, and Assistance programs
- Ability to deal effectively with the public in processing customer requests and complaints and coping with extreme cases of human behavior
- Collaborate with other departments on required documentation relating to Commercial Accounts
- Act as the escalation point for Customer Service Representatives, if supervisor or member of management team is unavailable
- Work with team members cross-organizationally to resolve customer concerns and/or complete assigned tasks.
- Resolves conflict by applying expert knowledge of customer or employee situations to identify disparities and recommend sound solutions.

PROJECT MANAGEMENT

- Maintains the Standing Application, Automatic Change of Tenant and Landlord programs and projects
- Collaborate with New Construction on new and existing commercial projects
- Shows initiative-takes ownership of work, does what is needed without being asked, follows through
- Establishes priorities and multi-tasks so that assigned duties are completed under pressures of time constraints and deadlines.
- Adapts and responds well to change; manages pressure effectively and copes with setbacks and changes in projects and priorities.

ADDITIONAL RESPONSIBILITIES

- Thorough knowledge of city utility services and charges
- Supports others and shows respect and positive regard for them; works effectively with individuals, groups, and customers via positive interpersonal skills.
- Explore creative and innovate ways of performing tasks and solving problems
- Helpful, respectful, approachable and team oriented; builds strong relationships and a positive work environment.
- Demonstrates receptivity to new ideas and approaches and adapts with flexibility to accommodate any changes in priorities, circumstances or schedule. - Is receptive to feedback, willing to learn
- Assists Customer Service Representatives with customer support during periods of staffing shortages or increased volume

GENERAL RESPONSIBILITIES

- Maintain regular attendance; leave schedule should be managed so as to not interfere with ability to accomplish tasks, including special projects and assignments with deadlines
- Adhere to NBU safety guidelines and practices at all times and in all situations
- Maintain a clean and safe work area, office, field site and vehicle as applicable
- Develop & maintain effective customer service skills for communications with co-workers, customers and the public
- Maintain strict confidentiality of business, employee and customer information in written and oral communications and safeguard sensitive documents
- Exemplifies NBU Core Values of Integrity, Stewardship, Team and Safety
- Adhere to NBU policies and procedures
- Other NBU Duties as assigned

Formal Education and Work Experience Requirements

Degree/Diploma Obtained: Associates

Field of Study: Communications

Work Experience Time Frame: Three Years or More

Other: - Three years of experience in customer service relations, preferably in utilities. Equivalent customer service experience, skills and abilities may be considered in lieu of Associates degree.

- Bilingual is a plus

Certification and Licensures Requirements

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Other Minimum Qualifications

- Experience with Harris Computer System preferred
- Strong interpersonal skills, both written and verbal, and organizational skills are required

Knowledge of Computer Software

| | No Knowledge | Beginner | Intermediate | Expert |
|----------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|
| Arc GIS | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| AutoCAD | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Crystal Reports | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Microsoft Access | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Microsoft Excel | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Microsoft Word | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Microsoft Publisher | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Microsoft PowerPoint | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Other Software Knowledge

Harris NorthStar (CIS system) including mCare, Fixed Network, SmartWorks, Itron, Customer Connect, Invoice Cloud (3rd party payment processor), ADP ezLabor (payroll), Scanner, Smartsheets, Laserfische (electronic document storage), Online Utility Exchange (Identification verification), Cognos Reporting, and Microsoft Office Suite.

Experience with Machines, Tools, Equipment and Other Work Aids

Personal Computer, Copier, Fax Machine, Scanner, Printer, Receipt Printers, Calculator, Telephone, Softphone

Physical Demands

Standing: Occasionally

- Making Presentations
- Observing Work Site
- Observing Work Duties
- Communication with Co-Workers

Fine Dexterity: Constantly

- Computer Keyboard
- Telephone Keypad
- Calculator
- Calibrating Equipment

Walking: Occasionally

- To Other Departments/Offices/Office Equipment
- Around Worksite

Lifting: Occasionally

- Supplies
- Equipment

- Files

Carrying: Occasionally

- Supplies
- Equipment
- Files

Sitting: Frequently

- Desk Work
- Meetings
- Driving

Reaching: Frequently

- For Supplies
- For Files

Handling: Frequently

- Paperwork

Monies

Kneeling: Occasionally

- Filing in Lower Drawers
- Retrieving Items from Lower Shelves/Ground

Pushing/Pulling: Occasionally

- File Drawers
- Equipment
- Table and Chairs
- Hose

Climbing: Occasionally

- Stairs
- Ladder
- Step Stool
- Onto Equipment

Vision: Constantly

- Reading
- Computer Screen
- Driving
- Observing Worksite

Foot Controls: Rarely

- Driving
- Operating Heavy Equipment

Dictaphone

Balancing: Rarely

- On Ladder
- On Equipment
- On Step Stool

Bending: Occasionally

- Filing in Lower Drawers
- Retrieving Items from Lower Shelves/Ground
- Making Repairs

Crouching: Occasionally

- Filing in Lower Drawers
- Retrieving Items from Lower Shelves/Ground

Crawling: Rarely

- Under Equipment
- Inside Attics/Pipes/Ditches

Hearing: Constantly

- Communication Via Telephone/Radio/To Co-Workers/Public
- Listening to Equipment

Twisting: Frequently

- From Computer to Telephone
- Getting Inside Vehicle

Talking: Constantly

- Communication Via Telephone/Radio/To Co-Workers/Public

Other

Click or tap here to enter text.

Environmental Factors

| | Never | Seasonally | Several Times Per Year | Several Times Per Month | Several Times Per Week | Daily |
|--|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Extreme Temperature (Heat, cold, extreme temp. change) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wetness and/or humidity (bodily discomfort from moisture) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Respiratory Hazards (Fumes, gases, chemicals, dust, and dirt) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Noise and Vibration (sufficient to cause hearing loss) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Physical Hazards (High voltage, dangerous machinery, aggressive Customers) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Health and Safety Conditions

| | Never (Never Occurs) | Rarely (Less than 1 hour per week) | Occasionally (1/3 or more of the time) | Frequently (From 1/3 to 2/3 of the time) | Constantly (2/3 or more of the time) |
|--------------------------|-------------------------------------|-------------------------------------|--|--|--------------------------------------|
| Mechanical Hazards | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Chemical Hazards | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Electrical Hazards | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Fire Hazards | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Explosives | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Communicable Diseases | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Physical Danger or Abuse | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Other

Occasional exposure to infectious diseases when interacting with public.

Primary Work Environment: Office Environment

Other: Click or tap here to enter text.

Overall Strength Demands

- Sedentary - Exerting up to 10 pounds occasionally or negligible weight frequently, mostly sitting
- Light - Exerting up to 20 pounds occasionally, 10 pounds frequently, walking or standing often
- Medium - Exerting 20 - 50 pounds occasionally, 10 - 25 pounds frequently, or 10 pounds constantly
- Heavy - Exerting 50 - 100 pounds occasionally, 25 - 50 pounds frequently, or 10 - 20 pounds constantly
- Very Heavy - Exerting 50 pounds constantly

Non-Physical Demands

| | Never | Rarely | Occasionally | Frequently | Constantly |
|---|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Time Pressure | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Emergency Situations | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Frequent Change of Task | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Irregular Schedule/Overtime | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Performing Multiple Tasks Simultaneously | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Working Closely with Others as Part of a Team | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Tedious or Exacting Work | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Noisy/Distracting Environment | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Other: [Click or tap here to enter text.](#)

Employee Statement of Understanding

THIS JOB DESCRIPTION DOES NOT CONSTITUTE AN EMPLOYEE AGREEMENT BETWEEN NEW BRAUNFELS UTILITIES (NBU) AND THE EMPLOYEE. Nothing in this position description restricts NBU's ability to assign, reassign or eliminate duties and responsibilities of this job at any time.

I HAVE READ AND RECEIVED A COPY OF THIS JOB DESCRIPTION.

Employee's Signature

Employee's Printed Name

Date