



Utility Account Specialist-Project Lead

Department:	Plymouth Utilities	FLSA Status:	Non-Exempt
Division:	Administrative	Job Status:	Non-Bargaining Unit
Reports to:	Finance Manager	Location:	Plymouth Utilities Operations Center
Prepared by:	Finance Manager	Approved by:	Plymouth Common Council
Date:	February 10, 2023	Date:	February 28, 2023

GENERAL DESCRIPTION

Under the direction of the Finance Manager, the Utility Account Specialist is a member of a small team assisting Plymouth area residents and businesses with inquiries regarding electric, water, wastewater, stormwater, garbage and recycling services. This position performs a variety of administrative and accounting tasks, handling a variety of complex and varied billing and service issues, while ensuring customer satisfaction and regulatory compliance.

JOB FUNCTIONS

The following duties and responsibilities are not to be construed as exclusive or all-inclusive. Other duties and responsibilities may be assigned and required.

Essential Job Functions of a Utility Account Specialist:

- Assist customers in a professional, efficient, and friendly manner.
- Answer questions, investigate and resolve emerging problems, and respond to customer complaints; work to resolve customer concerns and escalate issues when appropriate.
- Establish and maintain accurate and confidential customer records, processes requests for the start, cancellation and/or change of service. Verify customer credit and deposit information.
- Document customer interactions in Utility Billing account notes. (complaints, resolutions, disconnections, payment plans, payment difficulties, etc.).
- Process a variety of customer payments and assist with daily deposit (night box, mail, PSN batches, ACH, and in-person payments).
- Prepare customer correspondence (budget billing letters, special letters, mailings, average usage inquiries, and billing adjustments).
- Review and explain utility bills to customers. Explain utility service standards and requirements to customers.
- Build and maintain positive working relationships with co-workers, other City/Utility employees, and the public using principles of good customer service.

Essential Job Functions of a Project Lead:

- Manage projects that support the Utility administration in redefining and improving process and efficiency using technology and cross-functional collaboration. Prioritize providing transparency and documentation to support regulatory compliance and increase customer satisfaction.
- Review and enhance the customer experience on the Utility website.
- Create Q&A, dialog, and scripts to aid in customer discussions.
- Create and Review Monthly Customer Service report to verify service and rates billed for new customers.
- Prepare for Billing by monitoring the Water Leaks, Water High Usage, VEE reports, and Budget Customer Last Payment reports.
- Annually review and update Budget Billing accounts.
- Maintain city-owned cemetery records. Answers questions related to cemetery, sells cemetery plots, and coordinates with DPW, funeral homes, and service providers.

- Support Utility staff by ordering office supplies and misc. items and assist with the US Cellular phone program.
- Update/Distribute the Customer Care Manual, On Call Answering Manual, phone lists, and Inventory of Critical Needs binder.
- Annually, assist the DPW Director with the DNR grant applications, reports, and the Tree City Application.
- Annually, track and maintain activity measures for the City/Utility budget, and assist with annual PSC reporting.

OTHER DUTIES

- Provide back up for other office staff.
- Perform all other duties as assigned.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

- Ability to communicate information, policies and procedures clearly, concisely and tactfully, both verbally and in writing.
- Must possess a high level of integrity and work ethic.
- Ability to actively listen to customers with empathy and patience to help resolve issues.
- Maintain accurate records; verify information; compile and reconcile numerical and financial data.
- Exercise independent judgment in applying appropriate policies and procedures.
- Effectively and simultaneously manage a variety of tasks and assignments; work effectively under the pressure of deadlines.
- Ability to read, analyze and interpret utility business information and regulations, and respond to questions from department heads, co-workers, and the general public.
- Ability to calculate figures and amounts such as discounts, interest, and percentages.
- Proficient in using Microsoft Office Suite (includes Word, Excel, and Outlook).
- Experience using GIS, CIVIC Connect, or other ERP system preferred.

EDUCATION AND TRAINING

- Graduation from an accredited college, university, or technical school with an Associate's Degree.
- Two (2) to four (4) years related experience desired.
- In evaluating candidates for this position, the City may consider a combination of education, training, and experience which provides the necessary knowledge, skills and abilities to perform the duties of the position.
- Office experience which regularly requires the ability to communicate orally and in writing with a variety of people, as well as frequent interaction with the general public.
- Valid Wisconsin driver's License.

WORKING CONDITIONS

- Environment: Work is performed in a standard office setting; may require irregular work hours and may work from more than one location.
- Physical: Primary function require sufficient physical ability and mobility to work in an office setting; to stand or sit for prolonged periods of time; to stoop, bend, kneel, crouch, reach, and twist; to lift (up to 50 lbs.), carry, push, and/or pull light to moderate amounts of weight; to operate office equipment requiring repetitive hand movement and fine coordination including use of a computer keyboard; to operate automobile; and to verbally communicate to exchange information.
- Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Disclaimer: The job description has been prepared to assist in evaluating various classes of responsibilities, skills, and working conditions. It indicates the kinds of tasks and levels of work difficulty required of the position. It is not intended as a complete list of specific duties and responsibilities. Nor is it intended to limit or modify the right of any supervisor to assign, direct, and control the work of employees under supervision. Nothing contained herein is intended or shall be construed to create or constitute a contract.