

<b>POSITION PROFILE</b>	
<b>POSITION:</b> Customer Care Associate	<b>DEPARTMENT:</b> Customer Care
<b>CUSTOMARY WORK HOURS:</b> 8:00 a.m. to 4:30 p.m.	
<b>CUSTOMARY WORK DAYS:</b> Monday - Friday	
<b>SALARY GRADE:</b> Staff Support Schedule V	<b>STATUS:</b> Non exempt
<b>REPORTS TO:</b> Customer Care Manager	

**POSITION SUMMARY**

The Customer Care Associate position represents three distinct areas of responsibility including Receptionist, Cash Receipts and Customer Care Support. You will be assigned a principal area of responsibility and will coordinate with your fellow associates to complete these responsibilities on a daily and periodic basis. This position stresses a high degree of flexibility and accountability as you may be asked to perform any of these functions on a daily or periodic basis dependent on the needs of the business.

**PRINCIPAL ACCOUNTABILITIES**

**Receptionist Position**

DAILY

- Greets public who enter the Customer Services Office
- Answers all telephone calls that come to the main switchboard and routes them accordingly
- As back-up to the Company's Voice Mail system, takes messages, when necessary, for an extension or employee when applicable
- Collects customer payments
- Receives, prepares and distributes Customer Services inter-office mail
- Prepares daily cash deposit and balances petty cash fund
- Assists walk-in customers to identify their needs regarding new service, billing questions, Internet inquiries or repair issues, and locates the appropriate personnel to assist customers
- Provide backup as necessary to Cash Receipts and Customer Care Support positions
- Understands and accepts the necessity for reporting to work, on time, and is ready and able to perform the duties and responsibilities of the position on a daily basis
- Proactive involvement in the Company's Safety Program, including compliance with all rules and regulations, and for continuously practicing safety while performing their duties

PERIODIC

- Prepares customer record audits as necessary
- General filing, scanning and copying
- Processes California Lifeline database and customer record updates
- Maintains scheduling and messaging for the Company's Conference System
- Maintains scheduling and messaging for the Customer Operations conference room
- Contacts new Equal Access Carriers regarding submitted service requests to verify balloting information, updating master Equal Access list accordingly
- Processes PIC change requests from outside carriers
- Verifies PLD 3<sup>rd</sup> Party Verification notices; notifies CSR's of approved customers
- Documents results of customer install and repair surveys; forwards surveys requiring attention to appropriate supervisor
- Provides data entry of all bi-annual survey responses

- Prepares and distributes bi-weekly CARE Report to IXC's
- Updates department forms as necessary
- Prepares and audits annual directory introductory and community pages project
- Verifies address change notices from USPS and notes customer accounts
- Orders department supplies for all Operations Departments
- Updates phone system greetings for office closures and/or revised business hours
- Prepares notices for Customer Care building to notify customers of office closure and/or revised business hours.
- Prepares memos, letters and forms as necessary
- Provide backup as necessary to Cash Receipts and Customer Care Support positions.
- Updates, maintains and proofreads directory information and community pages.
- List of principal accountabilities is not exhaustive and may be supplemented as necessary

### **Cash Receipts Position**

#### **DAILY**

- Counts Cash Drawer each morning; deliver to Reception Desk
- Secures Cash Drawer in safe each evening
- Processes customer payments into billing system
- Processes customer checks into Bank of America electronic banking system
- Completes daily balancing of all payment batches
- Pick up customer payments from Post Office
- Meter outgoing U.S. Mail for morning and afternoon mail delivery to Post Office
- Provide backup as necessary to Receptionist and Customer Care Support position
- Understands and accepts the necessity for reporting to work, on time, and is ready and able to perform the duties and responsibilities of the position on a daily basis
- Proactive involvement in the Company's Safety Program, including compliance with all rules and regulations, and for continuously practicing safety while performing their duties

#### **PERIODIC**

- Processes monthly Company account adjustments
- Completes monthly payment balancing
- Prepares and maintains return check correspondence, adjustments and records
- Prepares and maintains recurring credit card denial correspondence, adjustments and records
- Files customer credit applications and paperwork
- Collect and scan documents for electronic filing to customer accounts
- Assists with preparation of customer service order confirmation letters, and customer service and repair survey letters
- Prepares Auto-Pay confirmation letters and/or emails
- Interacts with banking institutions as necessary regarding payments received and/or processed electronically.
- Order and stock all supply room items, and consumables for coffee bar
- Assists with annual archive filing project and disposal
- General filing
- Provide backup as necessary to Receptionist and Customer Care Support positions.
- List of principal accountabilities is not exhaustive and may be supplemented as necessary

## **Customer Care Support Position**

### **DAILY**

- Processes California Lifeline database and customer record updates
- Monitors customer self-care orders from website
- Prepares new service packets for CSR's to mail to customers
- E9-1-1 record maintenance
- Reviews switch audit and provides corrections as necessary
- Reviews PIC audit and provides corrections as necessary
- Provide backup as necessary to Cash Receipts and Receptionist positions
- Understands and accepts the necessity for reporting to work, on time, and is ready and able to perform the duties and responsibilities of the position on a daily basis
- Proactive involvement in the Company's Safety Program, including compliance with all rules and regulations, and for continuously practicing safety while performing their duties

### **PERIODIC**

- Processes and balances monthly billing register
- Prepares and maintains customer deposit refund records
- Prepares and maintains records of disconnected customers with credit balances
- Assists with preparation of customer install & survey correspondence
- Assists with preparation of customer service order confirmation correspondence
- Prepares payphone reports to national clearinghouse, BSG clearinghouse, and CPUC
- Runs and distributes the monthly High Toll Usage report
- Manages the monthly Number Referral Service audit; prepares customer correspondence
- Manages ADSL Equipment Inventory & programming Gateways
- Prepares monthly promotion confirmation letters to customers
- Reviews and resolves invalid customer email issues
- Processes monthly non-pay disconnect orders, restoral orders and final disconnect orders
- Processes the ZUM report
- Processes accounts for write off and submission to collection agency
- Process and maintain all MSAG record updates
- Processes weekly TNS file upload
- Audit new service customers for previous service/outstanding balances
- Processes unbillable reports
- Audit directory listings proof from publisher
- Processes directory advertising adjustments from directory publisher
- Submit reports for new business customers to directory publisher
- Audit customer accounts for class of service accuracy
- Processes quarterly California Lifeline True-Up audit
- Periodic customer record audits
- Assists with annual archive filing project and disposal
- Processes FEX adjustments
- Processes bankruptcy notices and adjust customer accounts as necessary
- Provide backup as necessary to Cash Receipts and Receptionist positions.
- List of principal accountabilities is not exhaustive and may be supplemented as necessary

## KEY PERFORMANCE FACTORS

### ACHIEVING RESULTS

- Applies knowledge of the job. Applies knowledge to new or challenging situations
- Applies technical skills (includes applying existing skills in new or challenging situations)
- Accepts responsibility for and follows through on tasks, assignments, and other responsibilities in a timely manner
- Meets departmental standards for productivity (rated on the basis of work accomplished to volume of work)
- Performs duties with accuracy, thoroughness, attention to detail, and neatness
- Sets challenging, but realistic goals
- Holds self accountable for individual results
- Monitors quality of own or others' work (e.g., double-checks the accuracy of information or work product; checks to ensure that procedures are followed)
- Takes actions to solve a problem or overcome an obstacle to achieving results
- Makes specific changes in work processes or own work methods to improve performance (e.g., does something better, faster, at lower cost, more efficiently; improves quality, customer satisfaction, morale, revenues)
- Performs work in a safe and healthful manner and in accordance with the Company's Safety Program

### PROACTIVITY

- Recognizes tasks, activities, assignments to be done and completes them without specific directive or actively seeks new duties or challenges
- Offers one or more ideas to improve work processes or departmental productivity. Initiates actions to address an anticipated problem or obstacles. Actions are within the constraints of respective authority
- Has the ability to seek information from a wide variety of sources concerning a problem or issue affecting a specific project or department as a whole

### TEAM ATTITUDE

- Expresses the belief that others are fully capable of contributing to the work process and being effective when given the chance
- Participates willingly in departmental or work group decisions. Demonstrates commitment to achieving departmental goals by assisting others, even if the task is not a part of their primary roles and responsibilities
- Shows respect for other's intelligence by appealing to reason
- Genuinely values others' input and expertise and is willing to learn from others (including supervisors, peers, and subordinates)

### ORGANIZATIONAL COMMITMENT

- Respects the ways things are done in the organization and does what is expected (e.g., dresses appropriately, presents the Company in a positive light). Follows Company policies and procedures
- Respects and accepts what management sees as important
- Understands and accepts the necessity for reporting to work, on time, and is ready and able to perform the duties and responsibilities of the position on a daily basis.
- Makes choices and sets priorities to meet Company's needs
- Cooperates with others to achieve organizational/departmental objectives
- Publicly acts to fit the Company's mission

### FLEXIBILITY

- Understands other people's point of view
- Able to shift easily from one task or focus to a different one
- Willing to change ideas or perceptions based on new information or contrary evidence
- Decides what to do based on the situation (e.g., acts to fit the situation or person)

### SELF-MANAGEMENT

- Demonstrates an ability to handle stress on the job (e.g., able to multi-tasks, prioritize)
- Controls own strong emotions, such as anger or extreme frustration. Remains calm in stressful situations, addressing difficult problems one at a time
- Remains productive under stress. Deals with stress directly and does not allow stress to weaken one's ability to complete a task or interact effectively with others

### CUSTOMER SERVICE ORIENTATION (internal and external)

- Gives friendly, cheerful service
- Follows through on customer inquiries, requests, complaints
- Keeps customer up-to-date about progress of projects (but does not probe customer's underlying issues or problems)
- Maintains clear communication with customer regarding mutual expectation, monitors customer satisfaction

## **PHYSICAL REQUIREMENTS**

- Possesses the ability to speak clearly and understandably and hear communications by telephone and in person
- Possesses fine and gross manipulation skills
- Must have good vision (with correction)
- Must be able to sit for prolonged periods of time
- Must have minimal ability to stand, sit, squat, bend, kneel, twist, crawl, reach, lift, balance, carry, push, and pull as required for light duties of standard office clerical positions
- Must be able to lift 20lb. maximum with frequent lifting and/or carrying objects weighting up to 10lb.

## **QUALIFICATIONS**

### EDUCATIONAL REQUIREMENTS

- High school diploma or equivalent
- 2 year college or vocational degree in business, or related field, desirable

### TECHNICAL REQUIREMENTS

- Basic general office skills
- Computer literate, emphasis on Microsoft Office
- Key board skills of 30 wpm.
- Customer service /relation knowledge

### WORK EXPERIENCE

- 2 years as a general office clerk or similar position, where duties correspond with the essential and periodic functions of this position

## **ENVIRONMENTAL CONDITIONS**

### GENERAL OFFICE CONDITIONS

Exposure to an air-conditioned/heated office environment with exposure to low noise levels from office equipment and voices. No exposure to notable hazards or unusual atmospheric conditions

**THIS POSITION PROFILE DOES NOT PROMISE OR IMPLY THAT THE ACCOUNTABILITIES LISTED ARE THE ONLY DUTIES TO BE PERFORMED OR THAT THE POSITION MAY NOT CHANGE, OR BE ELIMINATED. JOB TASKS AND RESPONSIBILITIES ARE NOT EXHAUSTIVE AND MAY BE SUPPLEMENTED AS NECESSARY. THE REQUIREMENTS FOR THE POSITION ARE REPRESENTATIVE OF THE KNOWLEDGE, SKILL AND/OR ABILITY TO PERFORM DUTIES OF THE JOB. JOB TASKS AND RESPONSIBILITIES MAY BE ALTERED AT ANY TIME, WITH OR WITHOUT WRITTEN NOTICE. IN NO WAY DOES THIS DOCUMENT ALTER THE AT-WILL STATUS OF THE PONDEROSA TELEPHONE CO.**

<b>DEPARTMENT SUPERVISOR:</b>	<b>DATE:</b>
<b>DEPARTMENT MANAGER:</b>	<b>DATE:</b>
<b>HUMAN RESOURCES MANAGER:</b>	<b>DATE:</b>