



## CUSTOMER SERVICES REPRESENTATIVE

JC: VA110  
PG: SEIU-11  
FLSA: Non-Exempt

PC: 714  
BU: 04  
Revised: December 7, 2004

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

### **DEFINITION**

Under general supervision, develops and implements a variety of innovative customer service programs; coordinates, evaluates and monitors existing customer service programs for effectiveness and efficiency; directs office support staff involved in customer service activities; and performs related duties as assigned.

### **CLASS CHARACTERISTICS**

This class is responsible for developing, implementing and coordinating multiple customer service programs and activities designed to enhance the passenger's image of the District. The class performs duties involving a high level of public contact and interaction requiring sensitivity and diplomacy. Incumbents may be assigned to one of the three customer service areas: Customer Services Center, Retail Sales, and Customer Complaints. Incumbents are responsible for independently addressing and resolving customer complaints. This class is distinguished from the Department Manager, Customer Service in that the latter has overall responsibility for all customer service and activities, including the transit information center.

### **REPORTS TO**

This position reports to the Department Manager, Customer Services.

### **Customer Services Representative – Customer Services Center**

**EXAMPLES OF DUTIES** – *Duties may include, but are not limited to, the following:*

1. Develops, implements and coordinates customer service programs and activities.
2. Assigns, directs and reviews the work of customer service office support staff; trains them in work procedures.
3. Performs and supervises daily balancing of cash for public intake area and off-site sales and maintains records of transactions; inventories and restocks ticket supplies and BART Company Store retail items.
4. Uses computerized inventory control system to track BART Company Store retail items.

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5. Investigates and processes ticket exchanges.
6. Uses business application software to prepare reports related to retail sales activities and regional identification cards for persons with disabilities.
7. Resolves customer complaints.
8. Serves as departmental budget coordinator, using Access database software to prepare budgets and track expenditures.
9. Identifies and resolves routine office systems hardware and software problems and arranges for maintenance and repair as needed.
10. Serves on task forces relating to customer service activities.
11. Represents the District in meetings with business, professional and community organizations and with the public; coordinates and administers special events.

### **QUALIFICATIONS**

#### **Knowledge of:**

- Principles, concepts, practices and procedures of customer service and relations
- Basic budgetary principles and practices
- Standard office practices and procedures
- Basic arithmetic and cash handling procedures
- Principles of inventory control
- Basic supervisory principles
- Business application software packages such as Microsoft Access and Excel; POS systems

#### **Skill/Ability in:**

- Developing, implementing and overseeing cash management procedures and accounting
- Implementing computerized inventory control systems
- Assigning, reviewing and directing the work of assigned office staff
- Making accurate arithmetic calculations and cash transactions
- Using business application software to prepare budgets and monitor expenditures and retail sales activities
- Preparing clear, concise and complete reports and correspondence and other written information
- Handling difficult customer service problems independently with tact and diplomacy
- Representing the District effectively in outside meetings with agencies, firms and the general public
- Establishing and maintaining effective working relationships with those contacted in the course of the work

### **MINIMUM QUALIFICATIONS**

#### **Education:**

An Associate degree in business, accounting, retailing or a closely related field from an accredited college.

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### **Experience:**

Four (4) years of (full-time equivalent) verifiable professional retail sales experience which includes daily closeouts, periodic reporting, tracking sales and inventory of tickets/merchandise, resolving customer complaints, and supervising sales clerks. At least two (2) years of experience must have included the use of POS systems and associated software such as Intellect to track retail sales and inventory; and at least two (2) years of experience with the use of business application software such as Microsoft Access and Excel.

### **Other Requirements:**

Must be capable of understanding and operating POS systems and associated software such as Intellect to track retail sales and inventory; and business application software such as Microsoft Access and Excel.

Must be able to lift boxes weighing up to 50 pounds.

Must possess a valid California driver's license and have a satisfactory driving record.

Must be willing to work off hours and weekends, if required.

### **Substitution:**

Additional related work experience as outlined above may be substituted for the education on a year-for-year basis. An Associate degree is preferred.

## **WORKING CONDITIONS**

### **Environmental Conditions:**

Office environment, exposure to computer screens.

### **Physical Conditions:**

May require maintaining physical condition necessary for sitting for prolonged periods of time and for lifting boxes weighing up to 50 pounds.

## **Customer Services Representative – Retail Sales**

**EXAMPLES OF DUTIES** – *Duties may include, but are not limited to, the following:*

1. Develops, implements and coordinates retail sales programs and activities.
2. Evaluates and analyzes programs in other departments that affect customer service activities.
3. Assigns, directs and reviews the work of customer service office support staff; trains them in work procedures.
4. Serves on departmental and District wide task forces relating to customer service activities.
5. Responds to customer comments and complaints.
6. Disseminates customer inquiries to appropriate departments for handling and follow-up on action taken.

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7. Solicits local retail outlets for ticket sales.
8. Obtains vendor contract agreements.
9. Implements strategies to expand off-site ticket sales programs including face-to-face solicitation of new vendors.
10. Coordinates activities of outside ticket vendors and maintains records of ticket sales.
11. Provides promotional materials to vendors.
12. Authorizes disbursement of tickets.
13. Prepares reports related to vendor sales activities.
14. Makes recommendations to Department Manager regarding what merchandise should be sold in the Company Store; sources, selects, and purchases merchandise.
15. Represents the District in meetings with business, professional and community organizations and with the public.
16. Plans and organizes promotions and contests; coordinates and administers special events.
17. Reviews, approves and coordinates group and school sales programs.
18. Conducts tours of District facilities.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles, concepts, practices and procedures of customer service and relations
- Methods, formats and techniques of printing, graphics, lay-out design and product or service promotion
- Standard office practices and procedures
- Basic supervisory principles

### **Skill in:**

- Developing, implementing and coordinating customer service programs and activities
- Analyzing the effectiveness of customer service programs
- Assigning, reviewing and directing the work of assigned office staff
- Evaluating customer comments and complaints and making appropriate responses and referrals
- Preparing clear, concise and complete reports and correspondence and other written Information
- Handling difficult customer service problems independently with tact and diplomacy
- Representing the District effectively in outside meetings with agencies, firms and the general public
- Making oral presentations to groups
- Establishing and maintaining effective working relationships with those contacted in the course of

the work

**MINIMUM QUALIFICATIONS**

**Education:**

An Associate degree in communications, public relations or a closely related field from an accredited college.

**Experience:**

Four (4) years of (full-time equivalent) verifiable experience in outside sales programs, which must have included at least one (1) year of experience resolving customer complaints and at least two (2) years of experience with the use of business application software such as Microsoft Excel, Access, and Word.

**Other Requirements:**

Must be able to lift boxes weighing up to 50 pounds.

Must possess a valid California driver's license and have a satisfactory driving record.

**Substitution:**

Additional related work experience as outlined above may be substituted for the education on a year-for-year basis. An Associate degree is preferred.

**WORKING CONDITIONS**

**Environmental Conditions:**

Office environment; exposure to computer screens.

**Physical Conditions:**

May require maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time and for lifting boxes weighing up to 50 pounds.

***Customer Services Representative – Customer Complaints***

**EXAMPLES OF DUTIES** – *Duties may include, but are not limited to, the following:*

1. Develops, implements and coordinates customer service programs and activities.
2. Evaluates and analyzes programs in other departments that affect customer service activities.
3. Assigns, directs and reviews the work of customer service office support staff; trains them in work procedures.
4. Serves on departmental and District wide task forces relating to customer service activities.
5. Reviews, analyzes, prioritizes, and responds to customer comments and complaints.

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6. Disseminates customer inquiries to appropriate departments for handling and follow-up on action taken.
7. Evaluates comment and complaint data for trends and prepares written reports of findings for District management; drafts letters of response for General Manager, Board of Directors and department.
8. Represents the District in meetings with business, professional and community organizations and with the public.
9. Plans and organizes promotions and contests; coordinates and administers special events.
10. Presents customer comments and issues to Operations Department for resolution.
11. Plans and coordinates customer outreach activities to further District goals or work with outside sponsors for joint promotions.

### **QUALIFICATIONS**

#### **Knowledge of:**

- Principles, concepts, practices and procedures of customer service and relations
- Standard office practices and procedures
- Basic supervisory principles

#### **Skill in:**

- Developing, implementing and coordinating customer service programs and activities
- Analyzing the effectiveness of customer service programs
- Assigning, reviewing and directing the work of assigned office staff
- Evaluating customer comments and complaints and making appropriate responses and referrals
- Preparing clear, concise and complete reports and correspondence and other written information
- Handling difficult customer service problems independently with tact and diplomacy
- Representing the District effectively in outside meetings with agencies, firms and the general public
- Making oral presentations to groups
- Establishing and maintaining effective working relationships with those contacted in the course of the work

### **MINIMUM QUALIFICATIONS**

#### **Education:**

An Associate degree in communications, public relations, psychology, social work or a closely related field from an accredited college.

#### **Experience:**

Four (4) years of (full-time equivalent) verifiable experience in dealing with the public which included handling customer complaints. At least one (1) year of experience must have included development of service/sales programs; and at least two (2) years of experience with the use of business application

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software, such as Microsoft Excel, Access, and Word.

**Other Requirements:**

Must be able to lift boxes weighing up to 50 pounds.

Must possess a valid California driver's license and have a satisfactory driving record.

**Substitution:**

Additional related work experience as outlined above may be substituted for the education on a year-for-year basis. An Associate degree is preferred.

**WORKING CONDITIONS**

**Environmental Conditions:**

Office environment; exposure to computer screens.

**Physical Conditions:**

May require maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time and for lifting boxes weighing up to 50 pounds.

**BART EEO-1 Job Group:** 3500 - Professionals  
**Census Code:** 2825 - Public Relations Specialists  
**Safety Sensitive:** N