



JOB DESCRIPTION

ACCOUNT REPRESENTATIVE I/II

Summary

Account Representative I/II team members work under general supervision from the Account Services Manager and have responsibility for a wide range of customer service and community development matters. Responsibilities include responses to customer inquiries, billing analysis, and providing presentations to business and community groups. Account Representative I is the typical entry level classification while Account Representative II is distinguished by greater responsibility and independence and may supervise or lead other team members.

Job Description

The Account Representative I/II works directly with residential and/or business customers via email and telephone, and through in-person meetings and interactions. They are expected to be experts in SVCE programs and to provide customers or other staff with technical explanations of SVCE programs and billing mechanisms. To be effective, the Account Representative will also need to develop familiarity with PG&E programs and billing mechanisms, and be able to analyze and explain usage and billing data for customers and other staff.

The Account Representative will also assist with outreach and community events within the SVCE service territory, to both educate and build relationships with various groups. Account Representatives may be assigned with tasks related to the maintenance and implementation of various SVCE customer programs.

The Account Representative II position is differentiated from the Account Representative I position based upon greater responsibilities such as handling more complex accounts, and the position may include supervision, as well as related experience.

Supervisory Responsibilities

The Account Representative II position may require supervisory and/or team leader responsibilities.

Essential Duties and Responsibilities

- Effectively explain the SVCE program to customers and respond to questions clearly and adequately.
- Explain utility bill details and charges and communicate billing information to customers.
- Perform rate and cost comparisons for customers.
- Provide support for escalated interactions from SVCE call center representatives.
- Manage incoming customer inquiries with professionalism and tact.
- Attend, present, and network at community meetings and events as SVCE spokesperson.
- Ensure correspondence with customers is clear, consistent and timely.
- Interface and maintain relationships with key accounts.
- Utilize CRM (customer relationship management) tools to track customer interactions.
- Manage portfolio of customers and programs as assigned.

Minimum Qualifications

Experience/Education

Education and experience equivalent to:

Account Representative I

A Bachelor's degree in accounting, communications, marketing or a related field and a minimum of two (2) years of experience managing key accounts with a utility or energy service provider. A Master's degree is desirable. Bilingual proficiency in Spanish and English is strongly preferred.

Account Representative II

A Bachelor's degree in accounting, communications, marketing or a related field and a minimum of four (4) years of experience managing key accounts with a utility or energy service provider. A Master's degree is desirable. Bilingual proficiency in Spanish and English is strongly preferred.

Knowledge of:

- Utility billing structures, bill presentment, and program operations.
- Community Choice Aggregation (CCA) programs and the services SVCE offers.
- The interaction between CCAs and investor-owned utilities.
- Diverse communities and customer types in the SVCE service area.
- Microsoft Excel, including some familiarity with functions and advanced features.
- Microsoft Office Suite, including Power Point and Word.
- Principles of account management, marketing and salesmanship.
- CRM platforms.
- Appropriate telephone and e-mail etiquette.
- Principles and practices of employee supervision (for Account Representative II)

Ability to:

- Take responsibility and work independently, as well as coordinate or participate in team efforts.
- Perform rate comparisons and bill calculations with multiple rate classes, tiers and billing components.
- Establish and maintain effective working relationships with supervisors, co-workers, customers, local community groups and organizations and SVCE Board members.
- Exercise sound judgment in applying appropriate policies and procedures.
- Demonstrate creative problem solving and commercial awareness.
- Communicate effectively both verbally (by phone and in-person) and in written form.
- Manage projects and time efficiently.
- Represent SVCE with confidence and enthusiasm.
- Be self-motivated with a strong drive to resolve issues quickly and effectively.
- Manage multiple priorities and quickly adapt to changing priorities in a fast paced, dynamic environment.
- Work accurately and swiftly under pressure.
- Demonstrate patience, tact and courtesy.

Willingness to

- Work occasional overtime or on weekends and evenings

Working Conditions

The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting

meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 20 pounds. SVCE will make reasonable accommodation of the known physical or mental limitations of a qualified applicant with a disability upon request.

Licenses/Certificates:

Possession and continued maintenance of a valid class C California driver's license or the ability to provide alternate transportation as approved by the CEO and a safe driving record.