



THE STATE BAR OF CALIFORNIA

OFFICE OF HUMAN RESOURCES

845 SOUTH FIGUEROA STREET, LOS ANGELES, CA 90017-2515 (213) 765-1100 • 180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639 (415) 538-2351

MEMBER SERVICES REPRESENTATIVE

Office: Office of Member Services
Status: Non-Exempt – General Unit
Grade: 7

ORGANIZATIONAL RELATIONSHIPS

Reports to: Manager Member Services / Executive Staff as Assigned
Supervises: None

DEFINITION

The Member Services Representative (MSR) receives, processes, researches and responds to inquiries from, and problem solves for, members of the State Bar of California regarding member services, including member records, member billing, education programs and compliance, insurance programs, and other services excluding the attorney admissions and discipline system and the State Bar's competence programs (e.g., professional responsibility questions addressed by the Ethics hotline and Competence Unit). The MSR conducts research and interacts with the various offices of the State Bar to respond to member inquiries, including providing direction to the website and to publications and other information resources of the State Bar.

MAJOR DUTIES & RESPONSIBILITIES

1. The MSR receives, processes, researches and responds to inquiries from members by telephone, e-mail, website and other technologies regarding member services including member records, member billing, education programs and compliance, insurance programs, and other member services excluding the attorney admissions and discipline system and the State Bar's competence programs (e.g., professional responsibility questions addressed by the Ethics hotline and Competence Unit) and is responsible for providing accurate responses to the member regarding the inquiry.
2. The MSR takes responsibility for obtaining a response to the member inquiry and working through the State Bar information resources to provide the member with accurate response to the inquiry and/or referring the member to the appropriate staff who can advise the member.
3. The MSR is responsible for using and maintaining computer systems and data bases concerning member services information, including entering initial contact information, records of verbal and written communications concerning a member inquiry, follow up research, referrals to others, actions taken for resolution and information necessary to assess the ultimate response to the inquiry.
4. The MSR is responsible for the research and preparation of reports regarding member services subjects as required.

Member Services Representative

Office of Member Services

5. The MSR researches members' inquiries, utilizing the State Bar's information resources, contacts appropriate staff and follows up with the member to assure the inquiry is addressed to the extent possible.
6. The MSR develops recommendations to Executive Staff for enhancing member service and member related subjects.
7. The MSR promotes a member-centric environment in the Member Services Center, effectively communicates with members and others concerning member inquiries.
8. The MSR assists with providing training to others regarding member service issues.
9. The MSR provides order fulfillment on request for State Bar publications.
10. The MSR promotes the facilitation of the member relationship with members and within the organization to internal State Bar constituencies.
11. The MSR may perform a number of other similar or related duties which may not be specifically included within this position description, but which are consistent with the general level of the job and the responsibilities described.

KNOWLEDGE & SKILLS

1. Principles of member and customer service techniques.
2. Basic techniques of electronic and hard copy record and file organization.
3. Principles of problem identification, analysis and evaluation.
4. Principles of effective writing and verbal presentation.
5. The basic rules of vocabulary, grammar, spelling and pronunciation as specified in Webster's New Collegiate Dictionary.
6. Within the introductory period, obtain a working knowledge of the State Bar and its member programs and services.
7. Business math for completing non-technical calculations such as addition, subtraction, multiplication and division.
8. Principles of electronic and office related research.

ESSENTIAL ELEMENTS / ABILITY TO

1. Endure long periods of sitting.
2. Communicate effectively by telephone.
3. Obtain and present material in person, by telephone, electronically and in writing.
4. Review and analyze written documents.
5. Make fine visual distinctions upon proofreading written documents and viewing information on a computer screen.
6. Possess visual capability and digital dexterity to operate a computer and other standard office equipment.
7. Digital dexterity to assemble, retrieve and replace files.

MINIMUM QUALIFICATIONS

1. Bachelor degree, or equivalent work experience in a field that develops the skills required for the functions and responsibilities of the position, and
2. Minimum one (1) year experience in member and/or customer service or equivalent.
3. Successful completion of the State Bar validated tests for the position.
4. Accomplished computer keyboarding skills.

Revised September 2012