

# Employment Opportunities



**POSITION:** Call Center Representative

**REPORTS TO:** Vice President of Member Services

**CLASSIFICATION:** NON-EXEMPT

**DEPARTMENT:** Call Center

## **SERVICE STANDARDS:**

The focus of this role is to:

- Act as a catalyst and promoter, reinforcing the following credit union's service standards:
- We always act in the best interest of our members.
- We own, respond, and expeditiously resolve member questions/concerns.
- We look for ways to innovate and improve the member experience.
- We continuously seek the opportunity to learn and grow.
- We maintain the highest degree of professionalism in appearance, language and behavior.
- We protect the privacy and confidentiality of all member and Credit Union information.

## **RESPONSIBILITIES:**

- Enhance the membership experience by providing customer service in a pleasant, professional, courteous, and efficient manner via telephone or correspondence.
- Ensure that necessary follow-up phone contact is made daily in order to deepen and maintain relationships with the members.
- Advocates for the member and acts as a liaison between the Credit Union and the member when necessary to gather information for a decision.
- Performs a variety of routine daily transactions for members by phone, including, but not limited to: providing account balance information, answer questions regarding share and draft accounts, money market accounts, debit card inquiries, account transfers, cleared checks, deposit and loan rates, credit card payments, direct deposits, check orders and stop payments.
- Support and educate members who request assistance for the use of Home Banking, Bill Pay, Mobile Banking, Online Account Opening, Shared Branching and other electronic services that are provided to the members.
- Takes incoming call requests for ACH payments from members and forwards to appropriate department for processing.
- Takes incoming calls requests from members for statement and check copies and forwards to appropriate departments for processing.
- Process phone payments related to loan payments, visa payments, skip a pay fees and new account funding.
- Provides members with forms for incoming and outgoing wire transfer requests as needed.
- Performs internal warm phone transfers to other departments when required.
- Follows up with operations department in order to provide members with forms via postal mail, email, fax, etc., necessary to transact business with the Credit Union.
- Cross-sell credit union products and services when appropriate.
- Participates in proactive outbound calling campaigns in order to promote ongoing membership.
- Meets or exceed call center goals for metrics such as but not limited to, one call resolution, speed of answer, answer call rate, abandoned rate and average talk time per call on a daily basis.
- Works independently, resolves member issues in a courteous and professional fashion, problem solves accurately while using sound judgment at all times.
- Maintain an ongoing awareness of developments/changes in policies, procedures, products and services.
- Ensure that all credit union member and employee related business is kept in the strictest confidence.

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- Performs other duties and responsibilities as assigned.
- Complies with all applicable BSA, AML, and OFAC regulations.

## QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- At least 1-2 years in a Credit Union, Financial Services or Credit Card call center environment is preferred.
- Six months in a call center environment is preferred.
- Must have excellent interpersonal skills when interacting with other departments and/or co-workers.
- Must have excellent communication and listening skills using courtesy, discretion and professionalism at all times.
- Demonstrates a positive and cooperative attitude with high regard for providing quality member service.
- Project a positive can do attitude to help sustain a team atmosphere within the Credit Union.
- Possess intermediate mathematical skills performing calculation involving percentages, decimals, etc.
- Computer navigation skills such as but not limited to, MS Word, Excel, Outlook, Internet Browser Applications, Online/Chat Support Software, Home and Mobile Banking experience are preferred.

## EDUCATION AND/OR EXPERIENCE:

High School Diploma and two to three year's related experience and/or training; Associate's degree or equivalent from two-year college preferred.

## CERTIFICATIONS:

- None required

## OTHER SKILLS AND ABILITIES:

Comply with job related regulatory requirements including but not limited to Bank Secrecy Act, Anti-Money Laundering, USA Patriot Act, OFAC and Fair Lending Regulations.

Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to effectively present information in one-on-one situations to members and other employees of the organization.

Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

Ability to operate a personal computer with a high level of proficiency utilizing core processing system. Ability to utilize other technological resources such as the Internet and e-mail.

## SUPERVISORY RESPONSIBILITIES:

- None

## WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform their responsibilities.

Noise level in the work environment is usually moderate.

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## **PHYSICAL DEMANDS:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform their responsibilities.

While performing the duties of this job, the employee is required to stand; sit; use hands to finger, handle, grasp or feel; stoop; knee; crouch; push; pull; reach with hands and arms; repetitive motion; lift; and talk or hear. The employee must occasionally lift and/or move up to 50 lbs. and frequently up to 10 lbs. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception and ability to adjust focus.

## **TO APPLY:**

Please send your resume to [careers@scientfcu.org](mailto:careers@scientfcu.org).