

# Contact Center Representative I

**Reports to: Contact Center Supervisor**

**Department: Contact Center**

**Job Status: Non-Exempt**

**Supervisory Responsibility: None**

The primary purpose of this position is to assist Health Advantage Federal Credit Union in achieving its vision to be the financial institution of choice among all eligible members and to provide programs and services that will enhance the lifelong wellbeing of our members.

Working as part of a team, the **Contact Center Representative I** is directly responsible for receiving and directing contact from members, ensuring that requests and questions are resolved promptly, courteously, and professionally.

## Main Responsibilities and Duties

- Answer incoming calls, determines the needs of the caller and verify the caller's identity, minimizing the caller's time and effort in resolving their concern. Research member inquiries to ensure proper follow up and satisfaction. Continuously check voice mail and reply to these calls accordingly.
- Identify products/services that might be beneficial to members and provide information about their value and benefit. Actively cross sell Credit Union products and services as related to member's needs, to ensure consistently meeting Solutions goals. Keep members informed of Credit Union services and policies.
- Perform teller functions accurately for members (i.e. transfer funds between accounts and/or loan, stop payments, close and reorder debit cards, provide balances and last five transactions, reissue and reset pin numbers, process loan or credit card payments, etc.) to assure member's needs are addressed in a polite and friendly manner.
- Connect members with ancillary services including Bankjoy, Joy, Bill Pay, Ezcardinfo and any other services.
- Assist other departments and branches with transactions as needed, provide support for the collections department and branch managers in fulfilling member requests and merchant verifications.
- Maintain an up-to-date and comprehensive knowledge of Credit Union products and services. Support the solutions program of the Credit Union.
- Refer members to the proper department for issues that cannot be resolved within your department. Assist area personnel and all other staff members as required, handling contacts and follow-up professionally. Complete required reports and related documents promptly and accurately.
- Ensure that work area is clean, secure, and well maintained.
- Follow all Credit Union policies, procedures, legal and regulatory requirements, including, but not limited to, understanding of the compliance with the Credit Union's BSA/CIP/OFAC program. Keep members informed of Credit Union services and policies.
- Maintain and project the Credit Union's professional reputation. Maintain privacy of member account information.
- Meet Service Standard Expectations, providing extraordinary financial products at the highest level of service to the membership.
- Attendance at workplace is required.
- Ability to handle high levels of stress.
- Good personal skills.
- Other duties as assigned.

## Competencies & Performance Measurements

To perform this job successfully, an individual should demonstrate the following competencies to perform the essential functions of this position.

- Ability to effectively multi-task and demonstrate a high degree of accuracy and attention to detail.
- Proficient knowledge to cross-sell all Credit Union products and services that are handled or promoted to ensure full use by members, including all related policies, procedures, rules and regulations.
- Must be organized and have the ability to prioritize while working in a fast paced environment.
- Maintain a professional and courteous relationship with members, staff, and vendors.
- Must be able to maintain confidentiality with employee and member personal information.
- Effectively work with third party vendors.
- Contact—the individual speaks clearly and persuasively in positive or negative situations, has excellent listening skills, can effectively respond to both verbal and written inquiries.
- Judgment—the individual exhibits sound and accurate judgment, makes timely decisions, and involves others as required and when needed.
- Problem solving—the individual identifies and helps to resolve problems in a timely manner and gathers and analyzes information skillfully.
- Quality management—the individual looks for ways to improve and promote quality and demonstrates accuracy and thoroughness.
- Planning/organizing—the individual prioritizes and plans work activities, uses time efficiently and develops realistic action plans.
- Security—the individual ensures procedures are observed to maintain appropriate levels of security.
- Safety—the individual observes safety procedures and uses equipment and materials properly.

## Knowledge and Skills

- High School Diploma or equivalent. Two year's related experience and/or training. Some college preferred but are not required.
- Excellent verbal and written contact and grammar skills
- Ability to effectively present information in one-on-one and small group situations to other employees, members, and potential members.
- Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures, or governmental regulations, financial reports and legal documents.
- Ability to understand and apply financial concepts and to add subtract, multiply and divide in all units of measure using whole numbers, common fractions, and decimals.
- Ability to solve practical problems and deal with a variety of concrete variables in situations where standardization exists.
- Good working knowledge of word processing software, spreadsheet software, e-mail software, use of the Internet and the ability to learn internal use software.
- Occasional varying work schedules may be required to support department needs
- Team player with a positive attitude and flexibility
- Professional demeanor and personal accountability
- Other: The employee must be able to perform this position safely, without endangering the health or safety to him or herself or others. The employee in this position must be capable of effectively handling multiple concurrent tasks and is flexible in handling daily tasks as required.

## Environment and Physical Activity

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

The environment for this position is an open office that is clean and comfortable. It may include some minor annoyances such as noise, odors, drafts, etc. The employee is in a non-confined office-type setting in which he or she is free to move about at will.

The employee, in the course of performing this position, spends time writing, typing, speaking, listening, lifting (up to 30 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception, and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling, and reaching.

The employee for this position may operate any or all of the following: telephone, cellular telephone, copy and fax machines, calculator, imaging equipment, postage meter, typewriter, computer terminal, personal computer, related printers, and teleconferencing equipment.

This position also requires travel by automobile between branches and ATM locations, and occasional travel elsewhere.