



Job Title:	Telephone Service Representative
Reports to:	Manager, Telephone Services and eCommerce
Employees Supervised:	No direct reports

Position Summary: The Telephone Service Representative primary duty is to provide superior member service while completing transactions and providing information on products and services to members via telephone and other remote delivery channels.

Essential Functions:

- Answer telephone calls in a timely manner and assist callers with questions regarding products and services, or refer callers to the proper department.
- Recommend and cross sell credit union products and services to members in accordance with established goals.
- Accurately process written and telephone orders for various monetary transactions and balance drawer daily.
- Process mail and written correspondence such as account ownership changes, certificate renewals, verifications of deposit, etc.
- Identify and correct member account problems through research and follow-up.
- Perform various account file maintenance actions including: processing requests for a change of address, name changes, check orders, and ordering ATM cards, etc.
- Provides service and corresponds with members through our Live Chat instant-messaging delivery channel.
- Open new account products and prepare and mail out new member packets.
- Provide support for monthly departmental mailings.
- Identify and recommend ways to continuously streamline or improve the work process and/or the work environment.
- Complies with all federal and state laws, as well as organizational policies, procedures, and processes, including (but not limited to) those related to the Bank Secrecy Act (BSA), Identity Theft Red Flags, and Office of Foreign Assets Control (OFAC). Performs related responsibilities as required.

Non-Essential Functions:

- Performs special projects and other responsibilities as assigned.

Knowledge, Qualifications and Skills:

- **Education:** High School diploma or equivalency required.
- **Experience:** One year of customer service experience required; previous experience in a credit union or financial institution preferred. Experience in Call Center desired.
- **Skills and Abilities:** Ability to answer telephones and communicate effectively with members and other credit union staff in person, in writing and by phone and manage difficult members and situations that arise. Must be a self-starter who is team oriented with a strong service philosophy that is able to multi-task in a fast-paced environment. Knowledge of Symitar software system preferred. Spanish/English bilingual desired. Proficiency in computer programs, (e.g., Microsoft Office).

- **Extra Credit Skills:** You will bring your enthusiasm, collaborative work-style, inquisitive attitude, flexibility, creativity, focus on excellence, strong analytical skills and overall “great-to-work-with” demeanor.
- **Travel Required:** Minimal travel expected. Any travel during assigned shifts requires ability to operate personal vehicle.
- **Hours Required:** Non-Exempt employee with a work schedule of Monday through Friday, generally 8 a.m. to 5 p.m. Hours may fluctuate moderately or change in the future accommodating business needs.
- **Environmental Conditions:** Work is primarily performed within an open cubicle on a second floor of a two story building with elevator. Subject to standard background noise found in an office environment.

Physical Job Requirements: The physical demands described here are representative of those that must be met by the person in this position to successfully perform the essential functions for the position.

- **Sit, Stand, Walk:** While performing the duties of the job the person in this position is regularly required to sit, stand, walk and move about inside the office to access file cabinets, office equipment etc. The duties in this position may require travel via personal vehicle which may result in long periods of sitting.
- **Use of Hands/Fingers:** To operate a computer, computer keyboard, mouse and other office productivity machinery, such as but not limited to; 10-key calculator, copy machine and computer printer. The person in this position is frequently required to sit and reach with hands and arms.
- **Speech/Hearing:** The person in this position frequently communicates via phone and other remote delivery channels. Must be able to talk to/hear members and educate them on products and services offered at the credit union.
- **Lifting/Pulling/Carrying:** The person in this position must occasionally lift/move up to 20 lbs.
- **Bending/Kneeling:** The person in this position occasionally moves to retrieve items from low cabinets for use in daily work activities.

Compensation: Depends on experience, plus an annual organization discretionary bonus of 0-8% of base pay

Approved by:	Date Approved:
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