

CALL CENTER

Job Description

Job Summary

Serves as a liaison between the member and the Credit Union in the Calling Center. Provide account information by phone or in person, as well as information on the full range of credit union products and services. Open accounts for members, resolve issues, and professionally handle the member's daily needs. Provide a variety of transactional services to members.

Greet and welcome members and visitors to the credit union in a professional manner. Provide prompt, efficient, and accurate service in the processing of transactions.

Provide in-person general and specific service-related information concerning credit union services or policies.

May respond to email or other electronic requests submitted by members, again providing prompt, efficient, and accurate service and information.

Respond to members' requests, problems, and complaints and/or direct them to the appropriate person for specific information and assistance.

Open new accounts, and service existing accounts. Set-up new account files, and provides members with all necessary information for membership.

Assist members in opening new plastic card accounts. Process PIN requests.

Handle requests from members for transfer of shares to loan payments, share withdrawals, check requests, CD transactions, line of credit advances, and any other requests received from members.

Promote credit union products and services based on member needs that are obtained from member interviews and/or review of member's account. Actively cross-sell credit union products and services.

Process member mail transactions. Mail receipts and checks to members as indicated by policy and procedure.

Provide information on investment alternatives to members wishing to deposit funds with the credit union.

Research accounts for deposit, withdrawal, and loan-payment discrepancies.

Assist members in balancing their accounts. Assist members with the proper completion of payroll deduction and direct deposit cards. Assist members in opening individual retirement accounts.

Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

Qualifications and Skills

Must have experience in either a high volume Calling Center or a Financial Institution.

Must have excellent customer service skills.