

Title: Call Center Representative I
Reports To: Electronic Services Director
Supervises: None
Status: Full-time, non-exempt

Accountabilities

Answer and direct incoming telephone calls, respond to member inquiries, process transfer requests and solve member account related problems. Guide and advise members in the efficient handling of their needs and consultative selling of products and services. Assist members with home banking related issues.

Requirements

Must have a high school diploma, or G.E.D., with six months general office experience or retail sales experience. Must have experience with keyboarding and personal computers. Must have excellent communication and sales skills.

Duties and Responsibilities

1. Answer incoming telephone calls and direct caller to appropriate department if the request cannot be completed in your department.
2. Assist members in the lobby or direct them to the appropriate area to meet their needs.
3. Daily processing of the checks in clearing through Blue Point and XRoads. Upload files through the Federal Reserve Bank.
4. Serve members by providing service and information in a pleasant, friendly, efficient manner via telephone or correspondence. Must be knowledgeable in teller transactions, savings accounts, checking accounts, IRA accounts, CD's, VISA, debit cards, consumer/real estate loans, home banking and bill pay, and Member Telephone Services.
5. Research and solve member questions, problems or complaints in connection with their Credit Union accounts.
6. Process incoming mail and deposit checks to members' accounts. Process returned mail such as statements or correspondence. Mail address change forms as needed.
7. Process change of address notifications and send proper letters to members in a timely manner.
8. Process returned deposit items to members' accounts according to proper procedures.

9. Cross-sell Credit Union products and services to fulfill member needs. Educate members about home banking and Member Telephone Service, in order to reduce their reliance on the call center for routine transactions/inquiries.
10. Process member check orders.
11. Process stop payments on checking accounts. This can be checks or ACH stop payments.
12. Process member account transfer requests. This may include setting up Individual Merges on accounts if necessary. Making sure Reg D counts are edited when necessary.
13. Process wire transfer requests that come in via e-mail or fax. Following guidelines to make the necessary calls and send required information to members so the wire can be processed. Run OFAC if needed. Refer members to Financial Services if they have not completed a Wire Transfer Agreement and they are doing the transaction in person.
14. Process new debit card orders as sent in contacts, order replacement cards and/or PIN numbers, and cancel and reorder compromised debit cards. Resolve debit card issues for members. Assist in filling out forms for unauthorized debit card charges.
15. Handle Enfact Calls and daily reports by calling members and completing proper paper work associated with the calls.
16. Mail requested information, applications, brochures to members and potential members.
17. Assist Electronic Services with return check processing on a rotating basis.
18. Maintain knowledge of all Credit Union policies/procedures and state/federal regulations applicable to your department.
19. Ensure that your work area is neat, professional and properly stocked with forms, supplies, etc.
20. Comply with all OFAC, Banks Secrecy Act and money laundering regulations.
21. Perform other duties as assigned.

Physical Requirements

This position may require sitting at a desk for up to 100% of the time. Periodically, heavy office supplies must be lifted and carried. Must be able to maneuver in a tight space, such as the vault cash room, safe deposit box room, and call center areas. Must be able to speak clearly, hear, use hands, walk, lift, bend, stand and sit for extended periods.