

Priority Trust CREDIT UNION Job Description

Position: **Call Center Representative**
Reports To: **Call Center Supervisor**
FLSA: **Non-Exempt**
Pay Scale: \$15.00 to \$17.00

Summary

Promotes a sales and service culture by actively recommending all Credit Union products and services while effectively meeting the member's needs, via phone and other electronic channels. Acts as a liaison for the members and the credit union, counsels' members regarding their financial matters and promotes the credit union philosophy and objectives.

Essential Duties

- Ability to interact positively with members and co-workers as a team in an enthusiastic, courteous, and professional manner, while maintaining our "4Loyalty Commitment."
- Answers telephone and email inquiries from members including but not limited to loan and deposit services; credit, debit, and ATM cards; account information, transfer requests, stop payments, check supplies, process payments and any other member request concerning products and services of the credit union.
- Ability to maintain a calm, professional demeanor when faced with high demand/high volume workloads.
- Evaluates member's needs and articulates the features and benefits of products and services and provides the member with available options.
- Assist members with origination of loan applications.
- Must possess excellent written and verbal communication skills along with the ability to articulate information as needed to members and team members.
- Collaborates with Supervisor/Management to maintain up-to-date information relating to training materials and procedures.
- Meet and/or exceed minimum standards set for call center representatives.
- Assist in training of new staff.
- Performs other duties as assigned by the Call Center Manager, Sales Director or Senior Management.

Minimum Job Expectations

- Maintain a call wait time of less than 5 minutes
- At least 10 credit card applications per month
- 30 loan applications per month

Role:

Employee shall demonstrate an understanding of and follow the requirements of all regulation compliance including but not limited to those Bank Secrecy Act (BSA), Anti-Money Laundering (AML), Office of Foreign Assets Control (OFAC), Customer Identification Program (CIP) and Member Due Diligence (MDD) as it specifically relates to their job functions. Employee shall be trained annually in BSA/AML compliance.

Qualifications

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.

- Minimum one year call center experience, credit union experience preferred.
- High School diploma or equivalent required.
- Must possess excellent verbal communication skills.
- Must have a proactive attitude toward members, supervisors, co-workers, and the credit union.
- Must be proficient in Microsoft Office products, including but not limited to Word, Excel, email, and Outlook.
- Ability to handle multiple projects simultaneously and work with limited supervision, exercising own initiative and judgment.

Physical/Mental Requirements

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

- While performing the duties of the job, the employee is regularly required to stand, sit, walk, use hands to finger, handle, or feel, reach with hands and arms, stoop, kneel, crouch or crawl, and talk or hear.
- The vision requirements include close vision and ability to adjust focus.
- Nature of position requires physical mobility and the ability to lift a minimum of 15 pounds.
- Must have flexibility to deal with changing work hours and locations as needed.