

Job Title	Contact Center Representative
Short Description	phone customer service
Full Description	<p>Position Description</p> <p>Department: Contact Center Reports to: Lead, Supervisor, AVP, Contact Center Supervises: None Skill Levels: Level I, Level II</p> <p>Position Purpose</p> <p>The primary purpose of this position is to assist Associated Credit Union in living out its Mission: To offer members financial products that fulfill their needs, service that exceeds their expectations, and relationships that inspire their trust.</p> <p>The primary responsibility of this position is to handle incoming calls that pertain to answering our members' questions in regards to their account and conducting transactions including but not limited to withdrawals, transfers and loan payments. Our Contact Center Representative must have an overall understanding of our products and services to assist our members in answering their questions and make recommendations as needed. The position will handle Member Services calls and has limited access to our Online Banking platform for resetting passwords.</p> <p>Essential Functions & Core Duties</p> <ul style="list-style-type: none">• Handling Inbound/Outbound calls.• Conduct transactions: withdrawals, transfers and loan payments.• Balancing payment history information with the member, reviewing findings, and identifying corrections needed.• Start/Stop ACH recurring payments.• Force Return, Stop Payments, and Skip a Payment.• Handling exceptions such as fee refunds and releasing check holds.• Update contact information such as address, email and phone numbers.• Online Banking password resets.• Educate members on our products and services.• Handling member questions with professionalism and seamlessly directing escalated questions to management staff.• Maintaining up-to-date knowledge of ACU policies, procedures and services. <p>Qualifications</p> <p>Education: High school graduate or equivalent.</p> <p>Experience: Minimum one-year experience in banking, auto financing, sales or other role that involves member service. Bi-lingual in English/Spanish is a plus.</p>

Core Competencies:

- Strong working knowledge of finance policies and procedures.
- Advanced math abilities.
- Excellent communication skills and phone etiquette.
- Excellent organizational and time management skills, sales and member service skills.
- Requires problem solving, researching skills, and good judgment.
- Proficient in computer skills with MS Office (Word, Excel, Outlook) and Adobe PDF knowledge. Able to easily learn other software needed for the position.

General Operational Requirements:

- Ability to work flexible hours and Saturdays as needed.

Performance Metrics

- The Contact Center Representative should strive to handle 900 calls per month with a transfer rate under 20%, requeued number of calls under 15 and 50% or higher ACD.
- Handling member questions with professionalism and seamlessly directing escalated questions to management staff.
- The ability to predict, recognize and define problems. Skill in generating, selecting and implementing timely and meaningful solutions.
- Observed attitude and demeanor.
- Proactive action in suggesting products or services that benefit our members' financial needs.
- After six months of tenure within our Contact Center, the Contact Center Representative's performance will be evaluated and, if deemed ready, will be cross-trained in Online Banking and moved into a Contact Center Representative tier II.

This job description is not intended to provide an all-inclusive listing of related job activities. Management may request the incumbent to perform other related activities in place of or in addition to those representative activities noted in this job description.

Education	High school diploma
Additional Comments	
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