

CHAMPIONS FIRST CREDIT UNION
DIGITAL EXPERIENCE REPRESENTATIVE – TALLAHASSEE, FLORIDA
Job Posting

THE CHAMPION'S CHOICE

Champions First Credit Union, the Champion's Choice, is seeking an ambitious team player who will be a champion for our members and play a leading role in maximizing their financial well-being.

Are you looking for a fulfilling career with a forward thinking, collaborative team where you are not only leading the charge but being coached to reach your full potential? Ready to join our winning team?

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General Summary

Using a variety of digital delivery methods, the Digital Experience Representative provides a high level of personalized member service including but not limited to offering Credit Union products and services, responding to complex member inquiries, researching member issues, and acting as a liaison between the member and other departments of the Credit Union.

Essential Functions

1. Represent the Credit Union to the members in a courteous and professional manner and provide prompt, efficient, and accurate service in the processing of member requests.
2. Provide by telephone and/or electronically, general and specific service-related information concerning Credit Union services or policies.
3. Respond to members' requests, problems and complaints, and/or directs them to the proper person for specific information and assistance.
4. Open new accounts and service existing accounts. Set up new account files and provide members with all necessary information for membership.
5. Handle requests from members for transfers of shares to loan payments, share withdrawals, check requests, line of credit advances, IRA transfers and rollovers, address changes and any other requests received from members.
6. Trouble shoots technological inquiries from members including the Corillian, bill payer, Evolve, Starstation and Call24 products.
7. Receive and review telephone loan applications; assist members with preliminary loan information. Additional responsibilities are to book out NADA values, pull credit, and obtain answers to standard loan interview questions – who, what, why, etc.
8. Maintain and distribute reference materials pertaining to products and services.
9. Maintain and distribute updates to policies and procedures set forth in the Digital Delivery department and in departments with whom the Digital Delivery team closely interacts.
10. Conduct orientation interviews on Credit Union services and programs with each potential Credit Union member and cross sell products based on member needs.
11. Provide information on investment options to members wishing to deposit funds with the Credit Union.
12. Actively participate and contribute to all departmental meetings and one-on-one coaching sessions with supervisor.
13. Evaluate fee reversal requests and various other member disputes.
14. Obtain, monitor, and review call center reports with Supervisor and make performance recommendations to enhance department production.

15. Must comply with all federal and state regulations pertaining to OFAC, BSA and FACTA.

NOTE: The list of essential functions is not exhaustive. It may be supplemented as necessary from time to time.

Additional Functions

1. Represent the Credit Union in professional and courteous manner.
2. Respond to all inquiries promptly and assist members in an organized and timely fashion.
3. Assist lenders with call backs and research on current active loan applications when necessary.
4. Participate in various outbound call projects, member surveys, sales initiatives, membership drives, and community activities.
5. Provide research assistance and assist other staff with complex issues when they arise.

Job Specifications

1. Professional, well-developed interpersonal skills necessary for servicing Credit Union members and projecting a positive image as representative for the Credit Union.
2. Work requires extensive knowledge of all Credit Union products and services. These characteristics are normally acquired through completion of a high school education plus some related experience in the member service and/or teller area of a credit union or financial institution.
3. Intermediate mathematical skills required (calculations and concepts involving decimals, percentages, fractions, etc.).
4. Written communications must be at an advanced level whereas the position of the Credit Union is communicated in complete sentences with proper grammar using spell check and any other electronic correction methods to avoid sending emails and letters incorrectly worded.
5. Must have a minimum of two (2) years of member service experience in a financial institution – preferably in the Call Center area.
6. This job operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, scanners, printers, filing cabinets and fax machines. Additionally, this job may occasionally be required to operate a vault, ATM for balancing process, cash counter, cash advance machine and coin machine.
7. This position requires manual dexterity, the ability to lift files and open filing cabinets and vault doors. Should be able to lift full boxes of work. This position requires bending, stooping or standing, as necessary.

Disclaimer

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

Competitive Compensation

We provide market-driven base pay, based on skills, abilities, and level of experience. Our salary ranges are broad, and individual salaries will be market competitive based on a candidate's unique set of skills and level of experience. The starting range for this position is \$14.19- \$17.74. Additionally, we believe that our team members are the reason for our success and all team members are eligible to participate in position specific incentive programs.

Benefits

At Champions First CU we offer a wide range of benefits to our team members and their eligible family members. Some of our great benefit programs you may be eligible for include:

- Medical, Dental and Vision Coverage
- Flexible Spending Accounts
- Life and Disability Insurance
- Retirement Savings with Company Match
- Tuition Assistance Program
- Team Member and Family Assistance Program (EAP)
- Paid Time Off and Paid Holidays
- Employee Recognition Program with Rewards