



## POSITION DESCRIPTION

Position Title: Contact Center Representative  
Department: Sales & Service  
Reports To: Member Engagement Manager, E-Services

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**SUMMARY:** The Contact Center Representative (CCR) is a dimensional and critical role that handles incoming calls in a high-volume, fast-paced environment. This role requires a strong ability to professionally and effectively communicate with prospective and current members on a broad range of topics across all lines of business. The CCR must possess knowledge of all CDC FCU products and services and be able to explore member needs, listen for clues and provide solutions utilizing the AID, INC. model. The CCR must be flexible to work as part of a team to maximize revenue growth and to meet or exceed personal, Contact Center, and Credit Union goals.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES:**

- Greet members by phone in a courteous, professional and timely manner, providing prompt and accurate member service. Ensure call metrics are achieved.
- Maintain an up-to-date and comprehensive knowledge on all CDC FCU products and services. Through utilizing the AID, INC. model, explore member needs and build relationships with members to assist them with their requests, suggest additional products and services that would benefit the member, close the sale and follow up periodically to maintain and enhance the member relationship. Identify opportunities to make referrals for mortgage products and to our Financial Advisor.
- While working in a member sales and service capacity, open memberships and deposit accounts, process and close consumer loan requests, resolve loan issues, manage deposit and loan account maintenance, update member information as required, and troubleshoot technology issues related to all remote delivery services.
- Following the credit union's policies and procedures, process a variety of monetary transactions by phone.
- Maintain an up-to-date and comprehensive knowledge on all related policies, procedures, and rules and regulations, including BSA and robbery procedures.
- Perform other duties as deemed reasonable.

### Education/Knowledge/Skills & Abilities:

- Associates degree preferred; one to two years related experience and/or training; or equivalent combination of education and experience.
- Prior cash handling and customer service experience a plus.
- Adequate computer literacy including proficiency in Microsoft Office applications such as Outlook, Word and Excel.
- Knowledge of banking or credit union teller or platform systems a plus.
- Strong "People" skills, comfortable multi-tasking, ability to work independently AND as a member of a team, capable in a relationship focused sales environment.

- Ensure regular and predictable attendance
- Bondable and have no felony convictions
- Maintain a professional appearance in accordance with CDC FCU's dress code
- Physically capable of performing assigned responsibilities; reasonable accommodations may be made to enable individuals with disabilities to perform the essential function

This position description is intended to describe the general nature and level of work performed. It is not to be construed as an exhaustive list of responsibilities.