

Alta Vista Credit Union

Job Description – Call Center Associate level I

Job Title: Call Center Associate Level I
Department: Call Center
Reports To: Call Center Supervisor
FLSA Status: non-exempt
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Grade: 5

SUMMARY

The Call Center Associate I greets members over the phone, determines and solves their immediate need, and discovers other opportunities to improve Members' financial lives by asking questions and suggesting appropriate products and services. The Call Center Associate I provides competent, courteous and concerned service to all external and internal members. Promotes a positive work environment in which member expectations are exceeded, teamwork is strengthened and personal growth of staff members is encouraged. The Call Center Associate I provides superior member service to members and co-workers by displaying Alta Vista's core values of Honesty & Integrity, Caring, Dedication and Commitment, Accountability, Serving a Worthwhile purpose, and Responsibility, during all interactions.

Corporate DUTIES AND RESPONSIBILITIES

Include the following, other duties may be assigned.

- Adheres to Alta Vista's Personnel Manual guidelines and actively supports The Stakeholders reward compensation model.
- Consistently displays excellence in Member service and maintains a strong desire to provide opportunities to improve members' financial lives by providing beneficial, convenient, accurate and courteous service to members and co-workers alike.
- Takes individual responsibility for preserving the image of Alta Vista by maintaining a superior appearance of professionalism, cleanliness and organization.

ESSENTIAL DUTIES AND OTHER RESPONSIBILITIES

- Consistently meets or exceeds sales goals set forth by the Call Center Supervisor by maintaining knowledge of benefits, features and price structures for all credit union products and services as well as the services provided by the credit union vendor partners.
- Provides excellent member service either over the telephone or via email by responding quickly to all member inquiries and requests for information.
- Prepares and compiles application and new member information to initiate loan applications and open new accounts over the phone.
- Practices active listening and asks open-ended questions to uncover unmet and unrecognized needs of members and potential members. Displays a superior knowledge of all credit union products and services and identifies appropriate cross-sell situations in which to offers such financial products and services.

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- Learns and maintains basic knowledge, independently trouble shoots problems, refers members consistently to Autoland, Alta Vista Financial Services, RE Masters, and Arrowhead Capital Mortgage. Can artfully explain Alta Vista's convenience/technology products such as: Bill Pay, Internet 24, Audio 24, Card Wizard and Main Street Check services.
- Provides ongoing relationship servicing with current members to maintain goodwill and gain additional business. Informs and advises members of status or enhancements to current account productivity. Makes outbound calls to ensure total member satisfaction and/or to inform members of special promotions, offers, etc.
- Completes yearly regulatory requirement training. Understands regulatory requirements and can demonstrate satisfactory knowledge of these laws and regulations and how they affect the job.
- Keeps abreast of current Marketing promotions and actively participates in meeting goals associated with each promotion.
- Provides support to the branches and members for debit and credit card issues, card maintenance and service fraud alerts.
- Coordinates and assists back office personnel in resolving member credit problems, delinquent payment issues, and other related affairs.

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.

EDUCATION and/or EXPERIENCE

Associates degree (A. A.) from two year College or; or one to two years related experience and/or training; or equivalent combination of education and experience.

LANGUAGE SKILLS

Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write professional business correspondence, reports, and procedure manuals. Ability to effectively present information about all credit union products, services and procedures respond effectively to questions or objections from members, co-workers or supervisory personnel.

MATHEMATICAL SKILLS

Ability to calculate figures and amounts such as discounts, interest, proportions, percentages. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

REASONING ABILITY

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral,

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diagram, or schedule form. Ability to define problems, collect data, establish facts, draw valid conclusions, and make independent judgments and decisions.

PHYSICAL DEMANDS

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 this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. The employee is occasionally required to stand and walk. Specific vision abilities required by this job include close vision, and ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Employee Signature_____

Supervisor Signature_____

Date_____