

EXTRA Credit Union
Structured Compensation - Job Description
Call Center Rep. I

Data Year: 2018

Prepared On: 07/31/2018

Department:	Call Center	Grade:	5
Reports To:	Electronic Services Manager	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:	LOH	Effective Date:	01/01/2011
		Revised Date:	05/14/2015

Role:

Be solution focused and interact with members and potential members in a positive and friendly manner. Trouble shoot, resolve, and process information in response to inquiries, concerns and requests about our products and services.

Essential Functions & Responsibilities:

- E 40% Interact directly with members and potential members by telephone or electronically. Answer member inquiries in a professional manner and be able to describe, demonstrate and cross sell all product and service features and benefits. Actively promote our loan products.
- E 40% Use listening skills and ask appropriate questions to determine member needs. Problem solve using credit union knowledge and resources. Remain calm under stressful situations and handle all calls with diplomacy and respect.
- E 10% Adhere to all credit union policies and procedures within our sales and service culture; keep current on all relevant changes within Extra Credit Union that affect our membership and be able to communicate changes to the membership in a positive manner.
- E 5% Follow up on member interactions to complete the service experience. This includes outbound calling for relationship building and sales and service opportunities,
- N 5% Perform other related duties as assigned.

Performance Measurements:

1. Provide accurate, courteous and friendly phone service to all members and potential members that contact Extra Credit Union; answer the call immediately and respond to correspondence within one day.
2. Achieve monthly goals and expectations as determined by Management. This includes, but is not limited to, product and service referrals, percentage of calls taken and time logged into the phone system.
3. Effectively and professionally control all phone calls.
4. Identify and communicate any training needs required to meet goals to the Manager.
5. Maintain knowledge of product and service offerings and provide alternative solutions when needed.

Knowledge and Skills:

Experience Six months to two years of sales-related experience; knowledge of member service principles and processes; work experience in a sales culture environment; relevant product knowledge and training.

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Education	A high school education or GED.
Interpersonal Skills	Above-average communication skills - verbal and written - are required, along with superior listening skills. The ability to control difficult members or situations is needed to be effective.
Other Skills	Knowledge of windows-based computer applications with accurate, quick keyboarding skills are required. Must be a team player with the ability to manage stress.
Physical Requirements	This job requires using hands and fingers to keyboard for data entry into a computer, which may include repetitive motions. Ordinary visual acuity is needed to prepare and revise documents. Average hearing ability is necessary to receive detailed information verbally. This job is mainly sedentary and may require the candidate to exert up to 20 lbs. of force occasionally.
Work Environment	No hazardous or significantly unpleasant conditions exist, such as in a typical office.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Printed Employee Name

Date

Employee Signature