

SUN EAST FEDERAL CREDIT UNION

POSITION DESCRIPTION

POSITION TITLE: Contact Center Representative I  
DEPARTMENT: Contact Center  
REPORTS TO: Contact Center Manager

POSITION PURPOSE

Under the general supervision of the Contact Center Manager, responsible for calls regarding account questions, problems, and/or transactions; handling the general services information; and, educating/cross-selling members on the use of Credit Union products and automated services.

JOB SPECIFIC DUTIES

- Educates members on the use of products and automated services, i.e. Sunny, ATM/Debit Card, Bill-payer, and home banking.
- Processes checks for withdrawal, requests for account transfers/verify funds, and places stop payments.
- Handles ATM/Debit Card and account related questions, requests, and problems.
- Handles requests for check copies, statement copies, and wire transfers.
- Processes requests for checkbook orders, address and payroll changes.
- Retrieves messages from answering machine and performs follow-up.
- Quotes present rates on all deposit and loan products.
- Responds to loan questions and problems, by providing the status of loan applications, calculating loan payments, and handling car value inquiries.
- Responds to member questions by providing necessary paperwork regarding fraudulent and questionable activity.
- Connects members with the appropriate credit union representative when necessary.
- Communicates current marketing promotions.
- Settles/balances daily.
- Resolves encoding errors for members.
- Answers MasterCard questions through Card Source.
- Completes deposit verifications.
- Handles member requests for certificates and changes to certificates.
- Performs other related duties as assigned.

## SKILLS AND/OR QUALIFICATIONS

Knowledge of PCs and general office equipment. Strong verbal communication skills, good reasoning ability and problem-solving skills. Previous credit union or banking experience preferred. Telemarketing experience a plus.