



Contact Center Associate

Position Title:	Contact Center Associate	Prepared By: Brian H. Reid/Debra Collins	Date: 01-01-2020
Department:	Contact Center	Approved By: Allen Upchurch	
Supervisor:	Contact Center Manager	EEOC:	FLSA status: Full-Time Non-Exempt

Job Function: The Contact Center Associate serves as a single point of contact for members utilizing email, fax, telephone, and a variety of systems. The Contact Center Associate must effectively determine and respond to members’ needs—identifying, and closing, cross-sell opportunities which go “above and beyond” in meeting member needs. Provide exemplary service to members. To initiate loan applications for members over the telephone and process as applicable. Assist members by providing account information, performing file maintenance; opening, balancing, and closing of accounts; transferring funds or other related transactions. The Contact Center Associate will embrace and promote the Credit Union of Atlanta’s culture and Thrilling Thirty behaviors to ensure that our members receive the “Total Member Experience” at all times.

Duties and Responsibilities:

- Manage incoming calls, emails, and faxes to assist members with account inquiries, stop payments, transfer of funds, check requests, line of credit advances, and request received from members.
- Research and resolve member account questions/problems (i.e., deposit, withdrawal, and loan payment discrepancies, overdrafts, charges, fees, transfers, etc.).
- Assists members and employees with all electronic services including mobile banking, remote deposit capture, home banking, online accounts, and web loan payments.
- Perform routine transactions, including but not limited to opening accounts, processing check and ATM/Debit card orders, setting up and assisting Home Banking/Bill Payment services for members, assisting members interested in Investment/Brokerage services, issuing temporary checks, processing deposits, withdrawals, loan payments, and transfers, accepting and processing loan applications.
- Perform at a “MEETS” or above level of Key Performance Indicators (KPIs) as defined in Contact Center Goals and Objectives document
- Promote and establish strong, positive, and productive working relationships to accomplish departmental and organizational goals
- Identify needs that can be met with credit union products and services through cross selling including opening deposit product accounts.
- Perform other job-related duties as assigned or required.
- Responsible for projecting and maintaining the Credit Union’s professional reputation with members by adhering to professional standards of conduct as enumerated in the Employee Handbook.

- Promotes and establishes strong, positive, and productive working relationships within the organization through commitment to the company’s mission and vision statements, its core values and performance standards
- Provide positive and timely responses to members’ and fellow employees’ questions and requests
- Assist in any area as directed by the Contact Center Manager

QUALIFICATIONS:

ABILITIES:

Strong sales and service skills. “Can-do” attitude. Excellent telephone skills. Effective written and oral communication skills. Positive, pleasant telephone voice. Fast efficient work habits. PC and math skills. Willing to learn new tasks and accept changes and new responsibilities.

**KNOWLEDGE/
EDUCATION:**

High school diploma or equivalent. Knowledge of CUA products, services, policies, and procedures. Knowledge of CUA loan products, policies and procedures a plus.

EXPERIENCE:

At least 1-year of teller or customer service-related experience. Prior Member Service and banking experience or training preferred.

OTHER:

- Dedicated and willing to give 110%, to get the job done
- Good interpersonal skills
- Follow-up skills are imperative
- Good sales skills
- A sense of urgency to book high quality loans
- Some Computer skills, (*MS Word, Excel, other*)
- Organization and problem-solving skills
- Time Management skills, and the ability to meet deadlines
- Excellent written and oral communication skills
- Flexible hours and some Saturdays