



Job Description

TITLE: Contact Center Representative

REPORTS TO: Contact Center Manager

PURPOSE

The **Contact Center Representative** is responsible for managing inbound calls from members, addressing inquiries, troubleshooting, and resolving concerns. This role requires a positive, solution-oriented approach while ensuring compliance with company policies and confidentiality guidelines. Representatives must demonstrate professionalism, attention to detail, and effective communication skills to provide high-quality service and contribute to member satisfaction.

PRIMARY RESPONSIBILITIES

- Greet members professionally over the phone
- Answer questions, troubleshoot, and resolve member concerns
- Provide high-priority service and follow up on member requests promptly
- Protect member confidentiality and secure proper member verification
- Process wire transactions
- Handle fraud alerts and online banking issues such as balance inquiries and transfer requests & loan payments
- Mail member documents and forms, including but not limited to certificates of deposit notices
- Review and approve or deny courtesy pay and fee reversal requests
- Update phone numbers or other account information as requested by members
- Promote and enroll members in credit union products and services, explaining their benefits and features
- Use Customer Relationship Management (CRM) for tracking cross selling referrals and meeting department goals
- Collaborate with other departments as needed to complete member inquiries
- Handle member messaging platforms, voicemails, and cashier check requests
- Make outbound calls when needed to promote products and services
- Follow Bank Secrecy Act (BSA) and other regulatory training requirements
- Adapt and welcome changes to effectively meet the business needs of the Contact Center and DMCU organization
- May be eligible for remote hybrid work option, based on availability and management's discretion
- Perform other duties as assigned



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REQUIREMENTS

- High School Diploma or GED required
- 1-2 years of experience in a financial institution, call center or customer service (preferred)
- Knowledge of credit union products, services, policies, and procedures
- Strong customer service skills with a commitment to outstanding member service
- Ability to work well under pressure and meet performance metrics
- Must work rotating Saturdays
- Reliable, independent, and consistent attendance
- Flexibility to relocate to different branches as needed

MEMBER SERVICE STANDARDS

- Professional demeanor and positive work attitude
- Strong teamwork and communication skills

WORKING CONDITIONS

- Ability to sit for long periods of time
- Ability to lift 10 – 15 pounds