



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, loan payments, and transfers
- Handle fraud alerts and online banking issues such as balance inquiries and transfer requests
- Remain informed of department updates, schedules, and operational communication through internal systems such as Microsoft Teams, calendars, and emails.
- Assist members through multiple service channels including phone, chat, text, and other digital communication platforms.
- Support a positive and collaborative team environment while contributing to department service goals and member experience.
- Adapt to evolving technology, processes, and service tools to support the changing needs of the Contact Center and organization.
- 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
- Maintain service standards and contribute to Branch Scorecard/sales goals by utilizing CRM.
- 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
- Contribute to the evolution of Contact Center toward full-service operations.



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- Adapt and welcome changes to effectively meet the business needs of the Contact Center and DMCU organization
- Perform other duties as assigned

BSA COMPLIANCE:

This job requires an understanding of and compliance with the Bank Secrecy Act, OFAC, the USA PATRIOT Act, and related credit union policies and procedures, including the reporting of suspicious activity, including insider abuse, as directed. The role includes the management and support of subordinate team members' responsibilities in these areas.

JOB COMPETENCIES:

- CRM-Utilizing
- Member Service
- Problem Solving
- Job Knowledge
- Communication
- Follow Through

REQUIREMENTS:

- High School Diploma or GED required
- 1-2 years of experience in a financial institution or call center
- 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 team.
- Completion of all required compliance and information security training annually.

WORKING CONDITIONS:

- Ability to sit for long periods of time.
- Ability to lift 10 – 15 pounds.
- May be eligible for remote hybrid work option, based on availability and management's discretion