

**Position Title:** Contact Center Specialist I

**Date Posted:** 08-01-2022

**Branch Location:** 3767 Sparks Drive SE, Grand Rapids, MI 49546

**Reports To:** Contact Center Manager

## JOB SUMMARY

The primary purpose of this position is to assist Preferred Credit Union in achieving our vision to become *the preferred financial partner of our members for their primary banking needs*. Ensuring the highest quality of customer service by providing information concerning the credit union as well as its products and services to credit union members.

## RESPONSIBILITIES

Ensure service is delivered to our members and team members that is in alignment with Preferred Credit Union's Service Promises:

- I promise to greet you with a smile and address you by name
- I promise to take responsibility in all matters
- I promise to make it easy to do business with Preferred Credit Union
- I promise to respond in a timely manner
- I promise to be knowledgeable
- I promise to maintain a high level of confidentiality
- I promise to make every effort to uphold mutual respect
- I promise to show you ways that Preferred can become a more valued financial partner

Additionally, meet all internal and external service expectations as measured by the Internal Service Survey and Member View.

- Cross-sell credit union products and services when appropriate.
- Serve membership by providing service and information in a pleasant, professional, and efficient manner via telephone or correspondence.
- Continuously check department voicemail and reply to these calls accordingly.
- Research and solve routine member questions, problems, and complaints concerning credit union accounts.
- Verify accounts, open/close sub-accounts, and answer questions regarding share accounts and loan accounts.
- Assist members with basic questions regarding their loans and accept short loan applications.
- Mail, fax, or e-mail new member applications, loan applications and/or information to member and prospective members.
- Responsible for researching member inquiries to ensure proper follow up and satisfaction.
- Document all phone call conversations in the tracker system accordingly.
- Assist non-member calls regarding inquiries about the credit union.
- Complete all other duties as assigned in a thorough manner.
- Ensure that all credit union member and employee related business is kept in the strictest confidence.
- Treat all credit union members and employees with a positive and cooperative attitude.

## BENEFITS *(waiting period may apply)*

401(k) matching • Medical Insurance • Dental Insurance • Vision Insurance • Life Insurance • Disability Insurance • Health Savings Account • Paid Time Off

## HOURS

- 40 hour work week