

Position Title: Contact Center Specialist I

Date Posted: 05-13-2024

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