

**KAUAI GOVERNMENT EFCU
 Job Description**

Job Title: Contact Center Agent	Effective Date: November 1, 2018
FLSA Category: Administrative	
FLSA Status: Non-Exempt	
Reports to: Member Relations Manager	
PURPOSE AND SCOPE	
<ul style="list-style-type: none"> • Provide support to the membership in their use of all delivery channels offered by the credit union. Serves as the primary point of contact for members communicating with the credit union remotely. Methods of communication include telephone, email, and other electronic messaging. • Represent the credit union professionally and in accordance with the expectations set forth by the credit union’s brand. 	
ESSENTIAL JOB FUNCTIONS	
1. Answer the credit union’s telephone and respond timely to member inquiries through remote channels such as online banking secure messaging, email, text message, and chat.	
2. Guide members and potential member through the online account opening process. Open accounts, onboard new account holders, and work to ensure their needs and expectations are met or exceeded.	
3. Guide members and potential members through the online loan application process. Answer basic loan inquiries and connect members with appropriate loan-granting personnel when necessary.	
4. Maintain a thorough working knowledge of the credit union’s deposit and loan products and services, and be able to effectively advise members on the best use for their individual situation.	
5. Process a variety of member financial transactions, balance and reconcile daily transactions, and cross-sell credit union products and services in a professional, competent, and courteous manner.	
6. Provide first-line assistance to members having technical difficulty using the credit union’s products and services.	

7. Provide back-office clerical support to the branch office operations.	
4. Perform other work as assigned.	

SUPERVISION RECEIVED
<ul style="list-style-type: none"> • Work with direct supervision from the Member Relations Manager. • Empowered to solve problems in a professional and timely manner. • Exercise discretion and independent judgment in tasks/situations detailed in departmental procedures.
MANAGEMENT/SUPERVISORY RESPONSIBILITIES
Directly Supervises: NONE

IDEAL EDUCATION AND/OR EXPERIENCE
<ul style="list-style-type: none"> • Associate degree preferred. • High School diploma and • Two year clerical/financial institution/Operations and customer service experience <p>For Internal Promotions:</p> <ul style="list-style-type: none"> • Above average performance rating from the previous two annual performance evaluations, and • Financial institution related educational courses/seminars (e.g., HCUL, CUNA, FEAH, etc.) as recommended by management.
IDEAL CERTIFICATES, LICENSES, REGISTRATIONS
NONE

IDEAL KNOWLEDGE/SKILLS

Must be able to communicate (verbally and in writing) clearly in the English Language.

REASONING/DECISION-MAKING/PLANNING ABILITY

Must be able to make good decisions dealing with members, employees, and the public in a timely manner.

CUSTOMER/MEMBER INTERFACE

Daily direct contact with external or internal customers or members using telephone, email, and other electronic messaging.

PHYSICAL DEMANDS

Work Environment:

- “Moderate” noise level in an enclosed air-conditioned facility (e.g., office with computers, printers, work area with light traffic, telephones, etc.).
- May require continuous communication via telephone and other electronic messaging for up to 4 hours.
- Usually indoor work with occasional work outdoors.
- Must be able to lift, push, and pull a minimum of 25 lbs.
- Must be able to operate office equipment such as: computer, typewriter, fax, telephone, photocopier, and calculator.
- Position may require prolonged sitting, standing, and walking.

TRAVEL REQUIREMENTS

Some travel may be required to attend meeting/educational offerings by car or aircraft to various locations throughout the United States. The length of the travel varies by purpose.

ATTENDANCE REQUIREMENTS

Please note that scheduled attendance requirements may change due to business needs.

Scheduled days of work when the credit union is open:

Monday, Tuesday, Wednesday, Thursday from 7:40 a.m. – 4:40 p.m.

Friday staggered shifts (CU hours: 8:30 a.m. – 6:00 p.m.)

Must be able to work additional hours, weekends, and Holidays as needed.

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I acknowledge that I have read the job description associated with the position that I now hold. I understand that revisions to this job description may occur. I further understand that I may be assigned projects or duties, as needed that may not be specifically listed in the written job description.

I further understand that if I cannot perform the necessary functions of this job, with or without reasonable accommodations, that I may be dismissed from this position and/or the company.

I understand that I have entered into my employment relationship with the company voluntarily and acknowledge that there is no guarantee of a specific length of employment. I acknowledge that this job description is not a contract, or a legal document. Accordingly, either the company or I may terminate the relationship at will with or without cause, at any time, so long as there is no violation of applicable federal or state law.

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Employee Signature

Date