



## Call Center Consultant I

Division: Branch Services  
Reports to: Call Center Supervisor

Classification: Non-Exempt

Revision Date: 2/09

Pay Grade 5N

Annual Review Completed on: \_\_\_\_\_

---

### **Purpose:**

*Provides consultative service to credit union members. Answers member inquiries received through the Call Center. Provides information concerning credit union eligibility, loan and share products and related services and policies.*

### **Essential Functions:**

1. Consults with members to identify needs and provide solutions that are in the best financial interest of the member.
2. Loads consumer loan applications.
3. Researches member inquiries, requests, or problems and follows through to resolution.
4. Prepares appropriate documentation and disseminates applicable disclosure information in responding to member inquiries via mail or fax.
5. Maintains confidentiality at all times.
6. Models the credit union culture through the following service standards:
  - I will immediately acknowledge and extend a friendly greeting
  - I will take ownership for service provided and effectively follow through
  - I will use appropriate opportunities to educate
  - I will actively listen to and arrive at a mutual understanding time frame
  - I will pro-actively pursue and find resolution
  - I will exercise unconditional positive regard and empathy
  - I will always express appreciation

### **Supervisory Responsibility:**

None

### **Job Scope:**

Situations typically encountered involve intermediate member financial needs or challenges. These include loan requests, new memberships, share account needs, information gathering, fraud support and other various account set up and maintenance.

### **Interpersonal Contacts:**

There is constant contact with co-workers at the branch level and with staff from other departments. Ongoing contact with membership and the general public.

### **Required Job Skills and Abilities:**

1. Must have excellent written and oral communication skills. Must have exceptional phone skills.
2. Strong time management skills.
3. Must have attention to detail.

4. Ability to apply credit principles, processes, regulations and standards.
5. Ability to make sound, logical decisions based on knowledge of policies, procedures, regulations, and guidelines.
6. Strong service skills.
7. Skilled in conflict resolution, negotiation, tact and compromise.

**Education and/or Experience:**

1. High School diploma or GED equivalent.
2. 1 - 2 years' experience in financial industry preferred.
3. Foundational Real Estate, Business Services and Individual Retirement account knowledge.
4. Computer experience preferred to include, but not limited to, Microsoft Word and Excel.

**Working Conditions:**

1. Sitting for extended periods of time.
2. Occasional reaching up to 24 inches.
3. Occasional lifting, carrying pushing, and pulling of items weighing up to 25 pounds.
4. Frequent keystroke activity.
5. Occasional business traveling involved.
6. Potential exposure to the threat of violence at any time.

**Disclaimer:**

This position description is designed to outline primary duties, qualifications, and job scope, but is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job. Our expectation is that each employee will make a willing and enthusiastic contribution whenever necessary to ensure the success of the credit union.