



Job Description

Position Title:	Member Service Representative– Contact Center	
Reports To:	Contact Manager	
FLSA:	Non-Exempt	\$19.98 - \$ 29.05 per hour

Primary Purpose:

The Contact Center Representative serves as the primary point of contact for members through phone, email, chat, and other digital communication channels. This position is responsible for delivering exceptional member service, resolving member inquiries, performing account transactions, identifying financial needs, and recommending appropriate credit union products and services. The Contact Center Representative is committed to building strong member relationships while supporting the Credit Union's mission, service standards, and growth objectives.

Duties and Responsibilities:

- ◆ Provide professional, courteous, and efficient service to members through all communication channels.
- ◆ Respond to member inquiries regarding accounts, loans, debit cards, online banking and other Credit Union services.
- ◆ Research and resolve member concerns accurately and timely.
- ◆ Educate members on Credit Union products, services, and digital banking solutions.
- ◆ Maintain a positive and member-focused attitude during all interactions.
- ◆ Process member transactions include transfers, payments, stop payments, account maintenance, and other service requests.
- ◆ Verify member identity and maintain account security standards.
- ◆ Ensure all transactions are completed accurately and in accordance with Credit Union policies and procedures.
- ◆ Identify member needs through effective conversations and active listening.
- ◆ Recommend products and services that improve members' financial well-being.
- ◆ Generate referrals for loans, deposit accounts, electronic services, and other Credit Union offerings.
- ◆ Support organizational sales, service, and membership growth goals.
- ◆ Meet established performance standards for service quality, productivity, attendance, and call handling.
- ◆ Document member interactions accurately and thoroughly.
- ◆ Stay current on Credit Union products, services, promotions, and procedures.
- ◆ Participate in training and development opportunities to enhance job performance.
- ◆ Adhere to all Credit Union policies, procedures, and regulatory requirements.
- ◆ Identify potential fraud and suspicious activity and report concerns promptly.
- ◆ Comply with Bank Secrecy Act (BSA), Anti-Money Laundering (AML), and other regulatory requirements.
- ◆ Work Collaboratively with Contact Center staff, branch teams, and other departments.
- ◆ Support team goals and contribute to a positive work environment.
- ◆ Assist other team members as need to ensure exceptional member service.

Basic Qualifications:***Education***

High School Degree.

Experience/Knowledge

One to three years of proven related job experience.

Certifications/Licenses/Registrations**Preferred Experience/Qualifications:**

Associate degree in Finance, Business, or Economics

Technical Competencies:

Excellent verbal and written communication skills.

Strong member service and problem-solving abilities.

Ability to multi-task and work efficiently in a fast-paced environment.

Basic knowledge of financial products and services.

Proficiency with computer systems, Microsoft Office, and digital communication platforms.

Ability to maintain confidentiality and exercise sound judgment.

Significant level of trust & diplomacy. Good organizational skills.

Physical Requirements & Work Environment:

Ability to sit for extended periods, use a computer and telephone regularly, and perform repetitive hand movements associated with keyboard use.

Ability to work extended hours and weekends.

Normal Credit Union environment.

Ability to lift 20 lbs. occasionally.

MISSION: TO PROVIDE FINANCIAL ADVANTAGE TO OUR MEMBERSHIP IN A WAY THAT PROMOTES THEIR OVERALL QUALITY OF LIFE.

2/2026