



northwest **plus** credit union

POSITION TITLE: Call Center Representative
REPORTS TO: Call Center Team Supervisor
SUPERVISES: No one
LOCATION: Everett
SALARY: *\$17+ hourly

*(dependent on experience)

I. Basic Responsibilities

Provide a high level of consistent service to our membership over the phone. Receives incoming calls and determines the products, series, or resources that the caller requires. Provides direct support to members or, when needed, connect them to the appropriate department that can provide the specific assistance they need.

II. Essential Functions

To perform the job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Contributes to **nw+cu**'s mission statement and goals by providing the highest quality of service, treating each person professionally – with warmth, courtesy, and respect, cross-selling additional services, and making a personal effort to make members feel they belong and are important to the credit union.
- Employs sound judgement, maintains knowledge of and, using decisions-making skills, adheres to all standards on internal and external policies and procedures and BSA regulations.
- Understands and complies with security procedures at all times.
- Responds and transacts to members' basic inquiries regarding the operation of accounts, access to services, account usage charges, interest rates on savings and loan products, resolving account discrepancies, and assisting members to make the most effective use of services offered by the credit union.
- Processes financial transactions for members including such functions as opening and closing accounts, issuing checks, issuing certifications and drafts.
- Consistently achieves goals assigned for referrals as well as call matrix guidelines.
- Opens, operated and closes computer terminal to accurately post transactions, access account information, and generally update member account transactions and information.
- Proactively offers additional products/services to complement member's immediate needs, including referrals to **nw+cu**'s Real Estate and Consumer Lending Departments.
- Performs such other member service functions that might be needed from time to time or takes on other clerical duties when required as assistance in every department may be require from time to time.
- Meets or exceeds all behavioral standards of a **nw+cu** employee.
- Complies and stays up-to-date with applicable laws, regulations, and operational procedures.



III. *Education and Skills Required*

To perform this job successfully, an individual must fully understand credit union products and services and be able to assist members to use these products and services. Cooperative and positive attitude toward members and credit union staff. Professional appearance and attitude as well as the ability to communicate effectively with members and fellow employees.

a. Education

1. High school diploma or general education degree (GED); plus 3-12 months' related experience and/or training or equivalent combination of education and experience.

b. Skills

1. Thorough knowledge of credit union's computer system for performing basic input/output tasks.
2. Ability to read and comprehend simple instructions, short correspondence and memos. Ability to write simple correspondence. Should effectively preset information in one-on-one situations to members, potential members, and other employees of the credit union.
3. A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature.

c. Other Skills and Abilities

1. Ability to operate general office machines and equipment such as a photocopier, fax, adding machine and computer.
2. Ability to accurately add, subtract, multiply and divide in all units of measure using whole numbers, common fractions, and decimals.

d. Preferred Skills

1. Relevant training in a credit union, bank or other financial institution. Skilled in software used in credit unions.
2. Spanish speaking preferred.

IV. *Working Conditions*

a. Physical Demands

1. Occasional standing and walking.
2. Frequent sitting.
3. Occasional lifting up to 20 pounds.
4. Occasional pushing, pulling, or carrying up to 20 pounds.
5. Occasional bending and squatting.
6. Occasional reaching at or below shoulder level.
7. Frequent use of hands in repetitive tasks such as simple grasping, typing motion, and twisting/turning of wrists.
8. Frequent finger manipulation to perform various clerical duties such as typing, filing, writing, and entering data into the computer system.

b. Use of Senses

1. Frequent talking and hearing in person and on the telephone.
2. Frequent periods of time viewing a computer monitor.
3. Frequent clarity of vision at 20 inches or more.



c. Mental Demands

1. Frequent interaction with others.
2. Frequent deadlines to meet.
3. Frequent attention to detail.
4. Frequent alertness, precision, and concentration to ensure accuracy of transactions.
5. Frequent use of initiative and problem-solving ability on routine matters.
6. Frequent performing of basic numeric calculations, as well as writing, reading, comparing, and analyzing.
7. Frequent use of initiative and problem-solving ability.

d. Environmental Demands

1. Normal workday occasional overtime.
2. Exposed to potentially hazardous conditions, i.e. Robbery.

NOTE: Job descriptions are not intended, and should not be constructed to be exhaustive lists of all responsibilities, skills, efforts, or working conditions associated with the job.

The credit union is an Equal Opportunity employer. Background reviews, including criminal and credit histories conducted prior to selection.