

Contact Center Agent



*Salary Grade: 6
Non-Exempt*

JOB TITLE: Customer Solutions Center Agent

DEPARTMENT: Retail Administration

REPORTS TO: Customer Solutions Center Manager

Position Summary: Under general supervision and in compliance with established policies and procedures, performs a variety of call center related tasks, such as assisting customers and potential customers with their telephone requests, explain services, respond to problems and directs calls to the appropriate department when necessary. The Customer Solutions Center Agents will be responsible for ensuring the customer has an exceptional experience during every interaction.

Supervises: No supervisory responsibilities

Essential Functions:

- Delivers outstanding service to both internal and external customers that meets or exceeds the Bank's service goals.
- Responsible for performing a broad variety of customer requests received over the phone and internet. .
- Provides information relative to The Bank's accounts, products and services, and processes requests within scope of knowledge and authority.
- Identifies cross-sell opportunities and cross-sells products and services to new and existing customers.
- Resolves customer requests and questions promptly, courteously and professionally.
- Provides an excellent customer experience by relating well to the customer, thinking and exercising sound judgment and acting responsibly in the customer's and Banks best interests.
- Verifies specific customer information to ensure accurate transaction processing and to prevent the misuse or intentional fraud of this delivery system.
- Assists customers with financial planning by making referrals to wealth management
- Assists callers with loan inquiries and rate information. Makes referrals to branches.
- Maintains record of all calls, sales and other necessary data for report generation and follow through.
- Responsible for end of day balancing and other operational tasks as business needs dictate.
- Performs other related duties as assigned.

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The above duties may not be all inclusive. The incumbent may be asked or required to perform other work as time and abilities allow.

Education and/or Experience

- High school diploma or equivalent.
- 1-2 years of experience in a call center/sales and customer service environment. Prior experience in a financial/banking environment preferred.
- Must have a high degree of technical aptitude and must be able to communicate technical information to non-technical users.
- Ability to troubleshoot and resolve advanced technical issues for end users.
- Strong organizational skills and attention to detail.
- Ability to work well under pressure in a fast paced environment.
- Ability to effectively communicate both verbally and orally with other employees and outside entities.

Physical Demands and Condition Requirements:

- General office environment.
- Requires standing and/or sitting for extended periods of time.

Equipment Used:

- General office equipment, i.e., calculator, photocopier, etc.
- Computer

ADA: The employer will make reasonable accommodations in compliance with the Americans with Disabilities Act of 1990.