

Customer Solutions Center Agent



*Salary Grade:6
Non-Exempt*

JOB TITLE: Customer Solutions Center Agent

DEPARTMENT: Retail Administration

REPORTS TO: Customer Solutions Center Manager

Position Summary: Responsible for delivering, via telephone/internet communication, the Bank's products and services to both potential and existing customers in order to maximize the profitability, competitiveness and growth of the bank.

Supervises: No supervisory responsibilities

Essential Functions:

Assists existing and potential customers via the telephone and Internet. Provides information relative to The Bank's accounts, products and services, and processes requests within scope of knowledge and authority or refers to appropriate person.

Cross-sells the Bank's products by determining customer's needs, informing them of new and existing products and services, and directing inquiries and issues to appropriate bank personnel when appropriate.

- Responds to customer inquiries.
- Receives, verifies and processes via the PC or telephone.
- Identify customers' needs, and, in turn, explain/sell the appropriate Bank product or service in order to meet or exceed individual sales and service goals.
- 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.
- End of day balancing.
- Performs other related duties as assigned.

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

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Physical Demands and Condition Requirements:

- General office environment

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.