

**Position:** Call Center Representative  
**Reports To:** Assistant Vice President  
**Location:** Stillman Valley  
**Date:** February 21, 2017

**SUMMARY OF GENERAL RESPONSIBILITIES:** Facilitates a positive banking experience for telephone customers by providing assistance, guidance and information concerning their accounts, as well as other available banking products and services.

**PRIMARY RESPONSIBILITIES:**

- Establishes a positive banking experience for customers by responding to calls in a quick, courteous and friendly manner.
- Listens attentively to customer questions, problems or concerns, asking appropriate questions for clarification in order to achieve a clear understanding of the issue. Provides answers and responds appropriately in a patient, thoughtful manner.
- Maintains a working knowledge of bank operations, products, services and policies, including electronic-based applications, and communicates information to customers in clear and simple terms.
- Communicates customer information and issues completely to subsequent bank personnel when transferring a customer call, thereby eliminating the need for customers to repeat their circumstances multiple times.
- Resolves customer complaints by investigating and researching complicated issues, and responding back to the customer the same day.
- Keeps supervisor informed of significant issues and documents such on the Quality Control Report.
- Demonstrates sound judgment and exercises discretion while resolving issues and problems.
- Seeks opportunities to promote and sell additional banking products and services to telephone customers.
- Calls new account customers after a reasonable amount of time has passed since their initial visit, to follow-up on their satisfaction with their banking experience, and to identify any service issues that may exist. Refers service deficiencies to other appropriate staff for resolution and documents issues on the Quality Control Report.
- Reviews and verifies the accuracy of data maintenance related to deposit and individual retirement accounts.
- Enters and retrieves customer data using applicable software.

- Prepares reports and correspondence as needed.
- Supports the overall objectives of the bank.
- Performs other duties or functions as assigned.

**EDUCATION, EXPERIENCE AND SKILL REQUIREMENTS:** Associate Degree in finance or banking is preferred along with some experience in a customer service banking environment. Previous experience in an inbound call center or customer service phone environment is also desirable, preferably in banking. Will consider other combinations of experience and education. Must be experienced in the use of computer data entry and retrieval systems, as well as Microsoft Office applications. Effective verbal, listening and problem-solving skills are required. Friendly, patient and courteous demeanor in dealing with the public is essential.

**PHYSICAL REQUIREMENTS:** Typical office environment with moderate noise levels and temperatures. Requires the ability to operate a multi-line telephone using a headset, as well as all types of typical electronic office equipment such as computers, copiers, fax machines and scanners. Primarily a sedentary position, but requires occasional standing, walking, lifting, carrying, bending, kneeling, stretching, stooping and manual dexterity using hands and fingers (for computer keyboard operation). Requires ability for extensive reading and viewing of paper documents and computer screens.

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The foregoing has been developed to describe the primary responsibilities of the Call Center Representative position. It is not intended, nor should it be construed to be, an all-inclusive list of the duties and responsibilities the position may be called upon to perform now or in the future.

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