



Job Title: Contact Center Representative

Department: Branch Operations

Reports To: Contact Center Manager

FLSA Status: Non-exempt

Summary

Contact Center Representative actively engages with Members, Non-Members, and peer Associates in the fulfillment of Aventa Credit Union goals and initiatives set by completing financial services via phone and electronic communication while upholding standards of the GREAT Service culture.

Essential Duties and Responsibilities

- Maintains a professional, courteous, and respectful manner in interactions by phone and electronic communication, including, but not limited to email, fax, secure message, etc.
- Provides quality service in alignment to GREAT culture initiatives with members, non-members, and Aventa Associates
- Makes every reasonable attempt to accurately verify Members, and supports in monitoring and deterring potential fraud efforts
- Actively engages within the Contact Center phone queue to meet call volume demands
- Monitors and appropriately responds to questions and communication presented from Contact Center voicemails, emails, fax, secure messaging, and other forms of communication presented
- Conducts non-cash based transactions, including balance inquiries, payments, transfers, etc. in an accurate and consistent manner in alignment with Aventa policies and procedures
- Develops working knowledge and application of products, services, and resources available within Aventa Credit Union to meet the needs of Members
- Provides support to Members impacted by fraud by initializing fraud disputes and communicating effectively with Aventa Fraud Department in ensuring resolution
- Builds understanding and comfort level in utilizing a wide range of platforms, software, and applications to deliver solutions to Aventa-Membership
- Actively champions Aventa products and services to existing members in cross-sell activities, as well as promotes Membership to potential applicants
- Completes referrals for lending services and products based on conversations handled
- Attend regularly scheduled training and develop understanding of applicable policies, procedures, processes and regulations
- Accurately completes account maintenance requests and saves required documentation for Image Capture and Retention
- May be called upon for assistance in special projects and support in areas such as Annual Meeting Reservations, mailings, etc. as approved by Assistant Vice President Operations
- Assists in answering questions and requests for members, both directly and via partnering with

internal resources as available within Aventa Credit Union

- Actively supports and participates in the following Deposit Operations functions:
- SWBC/Auto-Pilot Card and ACH Processing
- Travel notifications and address changes
- Debit card issuance, maintenance and Non-Fraud Resolution
- Credit card maintenance and replacement service
- Homebanking administrative support; secure messaging
- ContactUs email review and response
- Check batch creation (iPower)
- Check ordering (new and re-orders)
- Bill Pay Master Site support services and maintenance
- Corporate Café Check Image Requests
- Assist in the support of the overall safety and soundness of Aventa Credit Union
- Performs other duties as needed, or assigned

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations.

Member Service - Manages difficult or emotional member situations; Responds promptly to member needs; Solicits member feedback to improve service; Responds to requests for service and assistance; Meets commitments.

Interpersonal Skills - Focuses on solving conflict; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control;

Teamwork - Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone's efforts to succeed.

Organizational Support - Follows policies and procedures; Completes administrative tasks correctly and on time; supports organization's goals and values.

Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions.

Adaptability - Adapts to changes in the work environment; Manages competing demands; Changes approach or method to best fit the situation; Able to deal with frequent change, delays, or unexpected events.

Attendance/Punctuality - Is consistently at work and on time; Ensures work responsibilities are covered

when absent; Arrives at meetings and appointments on time.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience - High school diploma or general education degree (GED); or one to six months related experience and/or training; or equivalent combination of education and experience.

Language Skills

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and policies & procedure manuals. Ability to write routine reports and correspondence. Must be able to speak to the membership regarding their accounts and maintain positive communication among fellow associates

Mathematical Skills - Ability to calculate figures and amounts and basic mathematical equations as applied to financial services

Reasoning Ability - Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

Computer Skills - The Associate should have basic knowledge of the platforms, software and/or applications to successfully perform this job

Physical Demands

The physical demands described here are representative of those that must be met by an Associate to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Associate must have the ability to drive own vehicle or corporate vehicle.

While performing the duties of this Job, the Associate is regularly required to stand; reach with hands and arms and talk or hear. The Associate is frequently required to walk; sit and use hands to finger, handle, or feel. The Associate must regularly lift and /or move up to 10 pounds, frequently lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision and ability to adjust focus.

Work Environment

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Travel Requirements (Please note travel requirements are required for the SLV Region & select positions)
Some travel to Pueblo/Denver/Colorado Springs/San Luis Valley will be required.

Disclaimer

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.

Associate's Signature

Date