



## Contact Center Supervisor

<b>Department:</b>	Contact Center
<b>Reports To:</b>	AVP Member Services
<b>Classification:</b>	Non – Exempt
<b>Pay Grade:</b>	G9 \$26.13 (Min.) - \$32.66 (Mid.) - \$39.20 (Max.)
<b>Type:</b>	Full-Time
<b>Location:</b>	Glendora, CA

### Purpose:

Subject matter experts (SMEs) within their functional area(s). Keenly focused on creating a great Member experience, they act as trusted advisors for contact center teammates and leadership, supporting the credit union with knowledge and guidance. Provides detailed information and promotes credit union products and services to build relationships. Process transactions in areas of savings, consumer loans, real estate loans, and auxiliary credit union services. Handles most complex situations in the specialty area of expertise.

### Major Duties and Responsibilities:

- Assists the Contact Center Management to oversee the overall member contacts via telephone, chat, and email services to ensure member requests are handled in a prompt, accurate, and professional manner with the highest level of member service.
- Assists the members via phone, chat, or email, identifying needs and offering products and services that improve the financial well-being of our members.
- Serves as a subject matter expert in either card, lending, or electronic services advanced queues.
- Spends time observing representative interactions with both systems and members to uncover creative ways to improve the service experience. Provides recommendations to management on areas for improvement.
- Works with management to identify barriers to productivity by observing the way team members handle specific issue types and/or interact with systems and tools.
- Research and provide operational and technical expertise; understand system limitations and possibilities.
- Advocates for best solutions for members, team members, and the credit union. Accurately represents frontline voices and concerns to business leaders.
- Assists Contact Center Management to ensure that in all aspects of savings, lending and service transactions, including account auditing, processing monthly IRA required

minimum distribution; researches and resolves member inquiries, monitoring and controlling vault activity, daily balancing, ensuring proper levels of cash are available and high levels of security are maintained as well as special projects as assigned.

- Answers technical questions and gives transaction overrides. Contributes to the supportive work environment, harmonious working relations, and high employee morale and is a consistent participant in the department mentoring program.
- Delivers exceptional member service delivery to members requesting account assistance. Provides consultative services to members regarding credit union products and services by assessing the members' needs, addressing their concerns, and gaining agreement.
- Must be able to demonstrate full proficiency of Contact Center systems and tools. Leads effort with training of new team members and cross-training of existing team members in area of specialty; keeps up to date with policy/procedure updates.
- Provides members with assistance on Trusts, IRAs, deceased, legal, and more sensitive account issues. Has thorough knowledge of complex savings products and processes, including IRAs, deceased, and legal.
- Provides members with assistance and information on Real Estate products and services. Refers applicants as necessary to Real Estate and acts as department resource for more complex Real Estate transactions.
- Has thorough knowledge of consumer loan processes.
- Processes new memberships, additional share accounts, savings services, loan requests, and loan fundings as requested by members.
- Lead all retention efforts to uphold credit union service of standards and member relationships.
- Works with minimal supervision, using intermediate problem-solving skills and sound judgment. Assists in the escalation queue, serving as a role model to all team members.
- Assists the various departments with training of new team members and cross-training of existing team members in area of specialty; keeps up to date with policy/procedure updates.
- Performs other duties as assigned.

### **Expectations:**

- Adhere to the principles and requirements of all applicable laws and regulations relating to your position and your ACCU employment, including but not limited to the Bank Secrecy Act (BSA), the anti-terrorism procedures of the Office of Foreign Asset Control (OFAC), and the Anti-Money Laundering (AML) provisions of the USA Patriot Act. Complies with regulatory compliance and assigned training requirements, including but not limited to BSA regulations corresponding to their specific job duties. Failure to do so may result in disciplinary and other employment-related actions.

### **Additional Job Functions:**

- Provides suggestions for streamlining department and credit union operations. Assists with completing projects and reports related to the department. Performs other related duties as assigned or requested.
- Complies with regulatory compliance and assigned training requirements, including but not limited to BSA regulations corresponding to their specific job duties. Failure to do so may result in disciplinary and other employment-related actions.
- Tracks team performance, development, attendance, and Paycom entries.
- May act in the capacity of the Assistant Manager in his or her absence.
- Weekend hours may be required on occasion.

### **Qualifications and Educational Requirements:**

- High School Diploma required.
- A bachelor's Degree or equivalent years of experience is preferred.
- 3-5 years of previous related experience is preferred.
- Must complete FiCEP certification in 6 months of employment.

### **Disclaimer:**

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of responsibilities, duties, and skills required for personnel classification. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

### **Pay Scale:**

Our pay ranges are built to allow for candidates with various levels of skills and experience to be considered, as well as to allow room for growth and tenure achieved in this role over time. Typically, new-hire salary offers fall within the minimum to midpoint of a pay range for many candidates. Any offer extended to a candidate will be based upon their unique set of knowledge, skills, education, and experience, as well as internal equity.

### **ADA Compliance Statement:**

In compliance with the Americans with Disabilities Act (ADA), ACCU stands ready to accommodate any qualified employee with a disability who can perform the essential duties of their position, as long as necessary accommodations for that employee's disability don't cause an undue burden to the credit union.

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