



## Service Delivery Representative I

<b>Department:</b>	Contact Center
<b>Reports To:</b>	Member Development Manager
<b>Classification:</b>	Non-Exempt G6
<b>Pay:</b>	\$17.30 (Min) - \$21.61 (Mid) - \$25.78 (Max)
<b>Type:</b>	Full-Time
<b>Location:</b>	Glendora, CA

### Purpose:

The Service Delivery Representative, I will be responsible for handling a high volume of inbound and outbound calls from members, providing outstanding customer support, and ensuring customer satisfaction. As the Service Delivery Representative, I will also provide information to members on the Credit Union products and services to build relationships.

### Major Duties and Responsibilities:

- Exceed members' expectations through efficient, proactive, and accurate service to ensure a superior member experience by actively listening and assessing the needs of the member, explaining the features and benefits of targeted solutions, and ensuring first-call resolution of members' concerns.
- Delivers exceptional service to members requesting account assistance over the telephone, chat, and email services by processing member transactions and providing product and service information, while supporting service queues.
- May open new membership and/or additional products for new and existing members and assist members with automated services.
- Process member transactions efficiently and accurately with personal care. Contributes to the departmental goals by processing high-volume transactions with a sense of urgency.
- Provide consultative services to members regarding credit union products and services or refer members to the appropriate team member to assess the member's needs, address their concerns, and gain agreement.
- Serve members' financial needs via all remote communication channels: fulfilling requests, answering inquiries, completing transactions, resolving problems, maintaining the database, and providing information and education regarding ACCU's services.
- Identifying and correcting member account problems through research and follow-up.
- Advocate for our members and be willing to escalate calls as appropriate and or solicit help as needed.
- Delivering exceptional member service professionally and efficiently, while contributing to department goals on Quality Control and Call Center service objectives.
- Maintains confidentiality of credit union and member records.
- Performing various file maintenance including processing requests for a change of address, check orders, and ordering ATM cards, sales initiatives, etc.
- Complies with regulatory compliance and assigned training requirements including but not limited to BSA regulations corresponding to their specific job duties.

- Performs other duties as assigned.
- Weekend hours may be required on occasion.

### **Expectations:**

- Presents a professional image in both dress and manner while representing the Credit Union at either the Credit Union office or at community events.
- Communicates with members and staff in a professional and articulate manner in both verbal and written forms.
- Maintains a comprehensive understanding of the features and benefits of all Credit Union products and services in order to offer the most appropriate products to members. Keeps abreast of marketing promotions and educates members on new Credit Union benefits and offerings.
- Maintains up-to-date knowledge of the policies, procedures, rules, and regulations that govern the Credit Union operations.
- Ensures compliance with all Credit Union member service standards.
- Performs all member-related functions and activities in accordance with superior member service.
- Exercise sound business judgment.

### **Essential Functions:**

- Ability to perform duties as outlined under “Major Duties and Responsibilities.”
- Ability to communicate clearly and to be understood.
- Ability to stand increments of four hours.
- Ability to deal with sensitive and confidential information.
- Ability to work Saturdays or after normal business hours.

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

- High School Diploma or GED required.
- Less than 1 year of previous related experience required.
- Must complete FiCEP certification in 12 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.

### **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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