



Service Delivery Representative II

Department:	Call Center
Reports To:	Member Development Manager
Classification:	Non-Exempt
Salary Grade: Pay Range:	G7 \$21.03 (min.) - \$26.29 (mid) - \$31.55 (max)
Type:	Full-Time
Location:	Glendora, CA

Purpose:

As a Service Delivery Representative II, you will handle high volumes of incoming calls and provide exceptional member service for our members. In addition, you will provide thorough and accurate information regarding our various products and services and resolve inquiries and disputes professionally and efficiently.

Major Duties and Responsibilities:

- 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.
- 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.
- Processes member transactions efficiently and accurately with personal care. Contributes to the departmental goals by processing high volume with a sense of urgency.
- Actively identifies financial needs and makes appropriate credit union product or service recommendations to enhance members' relationships.
- Having a working knowledge of credit union deposit, savings, and loan products and all services.
- Performing advanced research on accounts and identifying and correcting member account problems.
- 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.
- May communicate with members using electronic correspondence.
- Performing various file maintenance including processing requests for a change of address, check orders, and ordering ATM cards, sales initiatives, etc.
- Actively inform members of credit union promotions and/or new products and services
- Assisting the department with the training of new and existing team members and serves as a role model.
- 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.

- Assisting the department by completing projects and reports.
- 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 professionally and articulately in both verbal and written forms.
- Maintains a comprehensive understanding of the features and benefits of all Credit Union products and services 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.
- 1-3 years 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 of 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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