

Ideal Credit Union
Structured Compensation - Job Description
Contact Center Representative I

Data Year: 2025

Prepared On: 03/05/2025

Department:	Contact Center	Grade:	6
Reports To:	Contact Center Manager/Assistant Manager	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:		Effective Date:	01/01/2010
		Revised Date:	03/07/2024

Role:

Provide members and prospective members with professional, accurate and friendly service through various channels. Resolve issues and answer inquiries within credit union service level and quality standards. Make recommendations using the Preferred Way of Selling.

Essential Functions & Responsibilities:

- | | | |
|---|-----|--|
| E | 50% | Provide members and prospective members with professional, accurate and friendly service through various channels. Resolve issues and answer inquiries within credit union service level and quality standards. Make recommendations using the Preferred Way of Selling. |
| E | 15% | Identify opportunity to educate and cross sell other products and services to benefit the member and the organization. |
| E | 15% | Complete online learning and attend all required training and staff meetings to increase product knowledge to enhance referral ratios and stay up-to-date on organization policy and procedure changes as well as compliance. |
| E | 15% | Perform other administrative follow up form member requests, including but not limited to forms, service requests and mail. |
| N | 5% | Performs other duties as assigned. |

Performance Measurements:

1. To provide accurate, courteous, friendly, timely, and professional service to all members and potential members while meeting Ideal Credit Union's service levels and standards
2. Demonstrate proficiency in system usage and sufficient job knowledge to solve member issues within scope. Attend required training
3. Be accountable to learn and put into practice training material, policy and procedure within scope of job
4. To successfully recommend products and services during member interactions.
5. 5. To maintain professionalism with respect to attendance, appearance, attitude and teamwork

Knowledge and Skills:

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|------------|---|
| Experience | One year to three years of similar or related experience. |
| Education | A high school education or GED. |

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Interpersonal Skills	Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.
Other Skills	Good listening and communication skills. Able to operate computer software programs and demonstrate effective problem solving skills on a daily basis.
Physical Requirements	This position involves sitting for extended periods of time, repetitive use of arms, wrist, and hands, and reaching with the arm on a continual basis. Typing or otherwise working primarily with fingers rather than with the whole hand or arm is required on a continual basis. Expressing or exchanging ideas by means of the spoken word, ability to receive detailed information through verbal and written communication, and the ability to see with or without corrective lenses are all necessities of this position on a continual basis.
Work Environment	Office environment, may include working extra hours and weekends, overtime, rotating shifts, and may be stressful at times.

Acknowledgment

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.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Printed Employee Name

Date

Employee Signature