



POSITION DESCRIPTION

Position: Call Center Lead
FLSA Status: Non-exempt
Grade Level: 8

Position Overview

Under the direction of the Branch Manager, the Call Center Lead work assignments are accomplished in accordance with established policies and procedures. Problems encountered are relayed and directed to immediate supervisor.

Essential duties and responsibilities:

- Presents professionalism in their job at all times, while possessing a courteous and friendly demeanor and attitude
- Acts as primary liaison with callers/members over the telephone involving matters relating to balances, transfers, and researching account discrepancies as needed
- Completes all data forms and enters indicative information into computer system for opening member accounts
- Assist in issuing TDI forms, taking stop payment orders, and wire transfers. Responsible for sign up on direct deposit and ACH entries. Performs maintenance Visa/ATM cards
- Assists in directing calls to appropriate personnel or branch location, as appropriate
- Assists with loans via Call Center duties (upon completion of appropriate level of training and per manager discretion and approval)
- Will serve in a supervisory capacity and oversee Call Center staff
- Other duties as assigned by direct manager or senior level staff, as determined by fluctuating business needs

Minimum Requirements:

- Minimum High School Diploma or equivalent, Associate's degree preferred
- Must have valid driver's license
- 1-3 years Supervisory experience within the banking industry is required
- Experience in a customer service support role
- Strong phone and verbal communication skills along with active listening skills
- Familiarity with banking systems and practices
- Ability to multi-task and work in a fast-paced environment

Competencies:

- Ability to read and interpret documents such as safety rules and procedure manuals. Ability to write routine reports and correspondence.
- Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.
- 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 and varying member issues daily.
- Must be able to handle sensitive information and proprietary financial data discreetly



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Work Environment:

Required to sit, stand, walk, stoop, kneel, crouch. Ability to use hands and fingers, handle, or feel objects, tools, or controls, reach with hands and arms. The noise level in the work environment is usually moderate.

May be required to lift and/or move up to 25 pounds occasionally. Specific vision abilities required include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.