



POSITION DESCRIPTION

eServices Center Specialist

JOB TITLE:	eServices Center Specialist
DEPARTMENT:	Financial Services
EXEMPT/NON EXEMPT STATUS:	Non-Exempt
PAY GRADE:	6
REPORTS TO:	VP of Member Experience
DATE:	January 2022

POSITION SUMMARY:

The eServices Center Specialist primary directive is to serve member needs by the telephone, digitally and virtually. Assist with member needs, service inquiries and identifying opportunities to educate member on digital services. Respond to inquiries, reviewing member accounts and performing account maintenance.

ESSENTIAL POSITION RESPONSIBILITIES:

- 60% Assist members and potential members with their telephone requests; responds to email requests for online and mobile banking or virtual appointments; answers questions about products and services and resolves member concerns; answers incoming calls by the second ring; educates members on credit union promotions/products/services; represents credit union with a courteous and professional attitude; provides prompt replies to correspondence.
- 20% Originate loan applications, memberships accounts and open subsequent accounts, accurately enters data into databases, identifies cross-sell opportunities, performs account maintenance, assists member with digital service enrollments.
- 15% Troubleshoot operational issues, such as online, mobile, debit card and ATM. Resets passwords, PIN offsets, travel notifications, lost and stolen cards and re-orders debit cards. Responds to member complaints and performs account research to resolve issues.
- 5% Perform other job related duties as assigned, may serve as back-up to Financial Services Department.

PERFORMANCE MEASUREMENTS:

- Provide informed, prompt, professional and accurate service and support to all members and associates.
- Respond to email, mobile and banking inquiries within the same day.
- Answer the telephone within 2 rings and maintain average handle times to under 3 minutes 30 seconds.
- Direct all telephone calls to the appropriate person with minimal transfers.
- Process member transactions with minimum errors.
- Effectively cross-sell products and services.

- Develop and maintain knowledge of all relevant policies and procedures to ensure compliance with applicable regulations.
- Troubleshoot and resolve member and internal inquiries in a timely, friendly and accurate manner.
- Maintain dependable record of attendance and timeliness.
- Submit loan applications on a timely basis to the Lending Department.
- Open accounts in a timely manner and with a high degree of accuracy.

REQUIRED STANDARDS FOR ALL EMPLOYEES:

Ensure quality service in all member interactions. Maintain a positive work environment that is respectful and professional towards members, co-workers, supervisors, vendors and visitors. Maintain complete confidentiality of member, employee, and Credit Union information. Abide by PVCU policies and procedures, including regulatory compliance requirements such as the Bank Secrecy Act, and ensure the safety and soundness of the Credit Union in all transactions and interactions.

NOTE: *This list of essential functions is not intended to be exhaustive. It may be supplemented from time to time as required and at the request of one’s supervisor and/or senior management.*

KNOWLEDGE, SKILLS, AND EXPERIENCE REQUIRED FOR THE POSITION:

- Professional, well-developed interpersonal and communication skills are essential for projecting a positive image of PVCU with management, employees, members, sponsors, vendors, visitors, etc.
- Requires a strong knowledge of Credit Union products and procedures
- High School diploma or GED is required. Above average proficiency with computer software applications is required including MS Office Suite.
- A minimum of six months to two years of experience in a member service function with a Credit Union or financial services organization is required.
- The ability to read, analyze, and interpret member account data, procedures, and regulations; ability to respond professionally to varied inquiries or complaints from members and vendors; and ability to effectively communicate and present information to a wide range of audiences.
- Intermediate math skills (adding, subtracting, multiply, dividing, percentages, proportions, fractions, interest) are required.
- The ability to work on a keyboard, wear a telephone headset, sit for prolonged periods of time, and communicate orally and in writing with members, management, vendors, etc.
- High level of confidentiality and diplomacy are required.

PHYSICAL AND OTHER JOB REQUIREMENTS:

- Positive, clear and pleasant phone voice
- Flexible weekday hours and some Saturdays
- Light lifting
- Prolonged sitting

I acknowledge and understand my job description

Date