

Malheur FCU
Structured Compensation - Job Description
Member Support Representative

Data Year: 2018

Prepared On: 04/30/2018

Department:	Operations	Grade:	5
Reports To:	Bobbi Alcoser / Abby Apodaca	Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	01/01/2010
		Revised Date:	04/30/2018

Role:

To assist members and potential members with their telephone requests; explains services, responds to problems, and directs phone calls to the appropriate area.

Essential Functions & Responsibilities:

- E 70% Assists members and potential members with their telephone requests; answers questions about products and services and resolves problems that are within their authority to resolve; refers problems that are beyond their authority to their supervisor, along with their recommendations.
- E 10% Identifies cross-sell opportunities and cross-sells services to members.
- E 5% Ensures the appropriate records are maintained and required reports are prepared.
- E 5% Duties include working as a receptionist and a variety of member service tasks.
- E 5% Maintains member account information on computer system.
- E 5% Performs other job related duties required or assigned.

Performance Measurements:

1. Provide informed, prompt, professional and accurate service and support to all members and associates by answering the telephone and returning messages.
2. Direct all telephone calls to the appropriate person with minimum transfers.
3. Process member transactions with accuracy.
4. Successfully recommend a new product or service to credit union members.
5. Develop and maintain knowledge of all relevant policies and procedures to ensure compliance with applicable regulations.
6. Troubleshoot and resolve member and internal inquiries in a timely, friendly and accurate manner.

Knowledge and Skills:

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|----------------------|---|
| Experience | Six months to two years of similar or related experience. |
| Education | A high school education or GED. |
| Interpersonal Skills | Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine |

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matters for purposes of giving or obtaining information which may require some discussion.

Other Skills

Good listening and telephone skills; able to operate a 10-key calculator, typewriter, and computer keyboard; able to make decisions with minimum information.

Physical Requirements

Sitting/Mobility : Approximately 85% of time is spent working at a desk, approximately 15% is spent moving around work area.

Communication : Ability to effectively communicate with co-workers, members and outside agencies, by telephone and in person.

Vision : Ability to effectively use a computer screen and interpret printed materials, memos and other appropriate paperwork.

Lifting/Carrying : Ability to transport files and office supplies.

Stooping/Kneeling : Ability to access files and stock supplies in low cabinets and shelves.

Reaching/Handling : Ability to input information into computer systems and retrieve and work with appropriate paperwork, equipment and supplies.

Work Environment

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

Printed Employee Name

Date

Employee Signature