

JOB DESCRIPTION



POSITION: Contact Center Specialist
REPORTS TO: Contact Center Supervisor
SUPERVISES: None

BASIC RESPONSIBILITIES

The Contact Center Specialist assists members with account based and membership related needs over the phone and through our electronic alternatives consistent with Columbia's policies, procedures and service standards. This position additionally assists fellow Contact Center Specialists, and other Columbia CU department staff, in finding solutions to inquiries and needs. They are committed to providing the highest level of individualized service by placing the member first. This position supports a variety of transactions, while listening closely to our members unique needs, and providing creative solutions as we strive to "Make Life Better". The Contact Center Specialist ensures our members receive exceptional service in a friendly, efficient manner.

ORGANIZATIONAL COMPETENCIES

- **Builds Trust**
Demonstrate an uncompromising standard of ethical conduct and integrity to include trust and respect for each other, our members, and our communities.
- **Communicates Effectively**
Have a passion for helping members and staff achieve their goals by educating, offering tools and assistance in response to the members' needs in a way that the members can fully understand.
- **Teamwork and Cooperation (within & across units)**
Respect each person's ability to create and contribute toward the goal of delivering quality member service and innovative products, individually or as part of a team, through open communication and mutual trust.

JOB SPECIFIC COMPETENCIES

- **Continuous Quality and Process Improvement**
Identify new processes, suggest better ways, and evaluate process utilization.
- **Dependability and Reliability**
Consistently show up for work, meet commitments, and perform job tasks reliably.
- **Interpersonal Skills**
Resolve interpersonal problems, maintain positive work relationships, and exhibit objectivity.
- **Member Orientation**
Respond to the members' needs, insist on high-quality service, and seek efficient service delivery.
- **Positive and Professional Approach**
Create a positive work climate and support the organization's mission.
- **Problem Solving & Judgement**
Seek diverse perspectives, proactively address concerns, and provide creative solutions.
- **Takes Responsibility**
Follow through on commitments, take ownership, and act like business owners.



ESSENTIAL DUTIES

- Knowledge of and compliance with Currency Transaction Reporting requirements and Columbia's Bank Secrecy Act compliance program.
- Maintain up-to-date knowledge on all credit union products and services.
- May act as department Safety Liaison.
- Meet individual and shared departmental goals as defined in Performance Expectations, such as Average Handle Time and Availability
- Participate in cross-functional projects, promotions and training.
- Perform additional tasks as assigned by department leadership commensurate with position.
- Communicate with members using multi-engagements on all available channels including chat, email, video chat and phone while limiting wait and hold times.
- Educate and recommend Columbia Credit Union products and services, including all digital products and services, to "Make Life Better" for our membership.
- Provide basic consumer and real estate loan information, and accurately process account and loan transactions, maintenance, fraud intake, or research requests in the first contact.
- Provide the highest level of member service by consistently demonstrating Columbia Credit Union Service Standards.
- Displays consistent teamwork and collaboration with others within Member Service and departments throughout the organization.
- Exercise independent judgment within set authorizations.
- Identify and refer members to our partners in Home Loans, Insurance & Investment and Business Services as well as other CCU services as needed.
- For onsite staff: responsible for closing duties to include, shredding or locking up all sensitive information and checking that all CCS desks are locked and clear of member information each night.

JOB REQUIREMENTS

- Minimum one (1) years' experience in customer service required. Financial institution and/or call center environment experience preferred
 - or a minimum of six (6) months experience at Columbia Credit Union in a member-facing role.
- Professional, mentally alert, and neat in appearance with an enthusiastic attitude.
- Excellent communication skills both verbal and written.
- Must be team oriented.
- Highly organized, detail oriented with ability to multi-task.
- Excellent communication skills both verbal and written.
- Possess sound decision-making and time management skills.
- Strong PC skills.
- Must be available to work hours of operation in the Call Center.
- Consistent and reliable attendance: work scheduled shifts to meet the service level expectations of our members.



PHYSICAL REQUIREMENTS

The physical requirements outlined below encompass the diverse range of abilities needed for individuals to effectively perform the essential functions of this job.

- Communicate information and ideas clearly for mutual understanding.
- Exchange accurate information effectively in various situations.
- Observe details at close range (within a few feet of the observer).
- **Constantly** remain in a stationary position.
- **Occasionally** move around the workspace.
- **Constantly** operate a computer and other office productivity machinery.
- **Rarely** ascend/descend a ladder.
- **Occasionally** position oneself to maintain files or other items.
- **Never** move items weighing up to 60 pounds across the office for various needs.
- **Never** work in outdoor weather conditions.
- **Never** operate a vehicle.
- **Rarely** travel between worksites.