

**Job Title:** Customer Resource Center Representative

**Supervision Received:** Deposit Operations Officer

**FSLA Status:** Full-time, Exempt

### **Summary**

To assist customers through telephonic communication, sell the Bank's products and services, provides customer referrals for new products and services on a daily basis.

### **Essential Duties & Responsibilities**

- Assist customer telephonically by giving account balances, transferring funds upon request, placing check orders.
- Solve online banking issues by resetting passwords and troubleshooting potential customer issues.
- Fax and/or mail customer account statements upon request.
- Maintain customer central information files within the core processing system while ensuring accuracy and compliance.
- Route incoming and internal calls throughout the banking centers
- Monitor rates for Certificates of Deposit, DDAs, IRAs, HSAs.
- Process returned mail in accordance with all financial institution regulations.

### **Position Requirements**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

- Ability to establish productive business relationships with others, both inside and outside the organization.
- Ability to work with little direct supervision in carrying out the tasks and responsibilities assigned.
- Working knowledge of Microsoft Office products and Internet Explorer.
- Excellent written and oral communication skills.
- Strong attention to detail.
- Must be able to operate standard business equipment: fax, copiers, printers, computers, etc.
- Must handle sensitive documents or other confidential information without compromising information.
- Must work well under pressure and meet deadlines.
- Must communicate and work well with all levels of employees, officers, directors, and service providers.
- Must be able to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).
- Must be able to arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations).

- Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Talk to others to convey information effectively.
- Actively looking for ways to help people.
- Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.
- Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Thorough understanding of Federal and State agency security requirements.
- Thorough understanding of Bank policies and procedures.
- Must be able to work on flexible schedule that at times may include late working hours or weekend hours.
- The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
- The ability to apply general rules to specific problems to produce answers that make sense.

**Required Education and/or Experience**

- High School Diploma or the equivalent.
- At least three years experience in banking.

Demonstrable knowledge of the Bank’s core processing system and applications

**Physical Demands**

The physical demands described herein are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodation will be made to enable individuals with disabilities to perform the essential functions.

- The ability to listen to and understand information and ideas presented through spoken words and sentences.
- The ability to communicate information and ideas in speaking so others will understand.
- The ability to speak clearly so others can understand you.
- The ability to identify and understand the speech of another person.
- The ability to see details at close range (within a few feet of the observer).
- The ability to read and understand information and ideas presented in writing.
- Ability to sit for long periods.
- Ability to stand, bend, and lift up to 50 pounds.

**Other Requirements**

Pursuant to the Drug Free Workplace Act of 1988, all employees must remain drug and alcohol free when reporting to work, while at work and while engaged in any work related activities

**Note:** *This document and the statements contained within it are intended to describe the general nature and level of work being performed by the employee assigned to this position. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of the employee.*

Employee signature below constitutes employee’s understanding of the requirements, essential functions and duties of the position.

toEmployee \_\_\_\_\_ Date