



## JOB DESCRIPTION

**Position Title:** Member Service Center Representative  
**Location:** Sodus, NY

### General Summary:

Works over the telephone with members daily to meet their financial needs and service expectations. Acts in a friendly, professional manner at all times. Demonstrates the ability to process member's transactions in a timely, efficient and accurate manner. Is instrumental in promoting a quality sales and service environment at Reliant. Actively cross-sells Reliant's products and services to meet members' needs. Is a member of the Member Service Center team and demonstrates the attributes of a team player. Demonstrates excellent sales ability and consistently possesses excellent analytical and communication skills.

Understands and follows expectations of Reliant's corporate culture. Consistently demonstrates the attributes of accountability, respect, and teamwork. Provides quality service and strives to exceed service expectations. Acts in a professional, friendly manner at all times. Completes work timely and accurately.

### Duties & Responsibilities:

*The following duties and responsibilities for this position are not all inclusive; others may be required or assigned.*

1. \*Perform routine member transactions including but not limited to transfers, loan payments, VISA payments and official checks.
2. \*Provide routine information and explain credit union services, including eligibility for membership, types of credit union accounts, fee structure, loan interest rates, current dividend rates, and branch office information.
3. \*Respond to member requests, problems, concerns and/or direct them to the proper person for specific information and provide assistance in a timely manner.
4. \*Interpret status screens on Keystone system. Provide members with account status, including balance information.
5. \*Performs duties including loan interview/application and discussion of deposit products. Demonstrates a thorough knowledge of product and services and is capable of discussing various member services issues to provide resolution to the member.
6. \*Utilizes credit skills of interviewing and accepting loan applications over the telephone. Understands lending and credit decision process. Able to discuss various lending services to effectively sell credit products and build member relations.
7. \* Can interpret data on history computer screens. Understands and is able to explain account relationships such as single and joint ownership, trust, etc. Also is able to explain to member sub-accounts and federal deposit insurance coverage.
8. \*Has working knowledge of Reliant's automated systems such as, online and mobile banking, Bill Payer, Meridian Link, and ATM.
9. \*Makes outbound telephone calls for Member Service Center, marketing campaigns and promotions to acquire additional member business and enhance service quality. i.e. new members, recently closed mortgages,

lending, maturing certificates, VISA credit balances, inactive or closed VISA's, closed accounts and various promotions.

10. \*Demonstrates positive attitude in supporting Reliant's Mission and Corporate Culture.
11. Demonstrates knowledge of IRA accounts with the ability to answer questions on eligibility, contributions, rollovers, transfers, withdrawals and periodic payments. Able to establish accounts with proper documentation.
12. Contributes to the input for the annual Performance Plan.
13. Advocates the continuous review of Member Service Center procedures and practices to ensure consistency of operation and offers input to Supervisor when situations or ideas are identified.
14. Contributes to building team spirit.
15. Establishes payroll deductions and direct deposit using correct documentation.
16. Takes ownership of situations such as loan closings, loan follow up, etc. and communicates the results to the appropriate staff member of action taken.

*\*Indicates an essential function of this position.*

#### **Required Knowledge, Skills and Abilities:**

1. Excellent oral and written communication skills, with ability to communicate effectively by email, telephone, to answer member service questions with accuracy in a friendly and professional manner.
2. Ability to problem solve effectively. Demonstrate sound judgment, good decision making skills, trustworthiness, and patience while handling members' transactions and answering staff questions.
3. Understand and value the importance of confidentiality.
4. Strong planning and organizational skills, with ability to prioritize and meet deadlines.
5. Strong personal computer skills; familiarity with Microsoft Office Suite preferred.
6. Ability to provide quality customer service to members.
7. Strong sales skills.
8. Mathematical skills.
9. Self-starter with the ability to work independently while supporting overall team effort.
10. Working knowledge of financial services from a sales, service and compliance perspective.
11. Demonstrate the ability, enthusiasm and initiative to work in a fast-paced, high volume environment, willing to work staggered hours and a flexible schedule including Saturdays.

#### **Minimum Training and Experience:**

1. High school diploma required.
2. One (1) to three (3) years of related experience in financial services, sales, retail or telemarketing environment is desirable.
3. Experience in telephone center preferred

#### **Physical Requirements**

1. Ability to lift and move a minimum of 20 lbs.
2. Ability to sit for extended periods of time.
3. Ability to use keyboard, monitor, telephone, and other standard office equipment.
4. Ability to speak, hear, and communicate effectively on telephone, and or while using headset.
5. Ability to communicate effectively with others in person and via telephone, email, and written documents.
6. Ability to decipher data contained on computer screens, within documents, reports, spreadsheets, etc., presented both on paper and electronically. Ability to read fine print.
7. Ability to travel throughout a two-story building including stair climbing and descent and/or elevator operation.

**To Apply:**

Email or mail your resume and cover letter to:

careers@reliantcu.com

Attn: Careers  
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