Job Title: Member Contact Agent

Reports To: Member Contact Center Manager
Status: Non-Exempt **Date:** August 2026

Position Summary: Meets member's financial needs by providing exceptional, efficient service over the phone on the full range of credit union products and services. Promotes and cross sells CCU products and services to members. Performs all duties in compliance with CCU policies and procedures.

Principal Duties and Responsibilities:

- Answers incoming calls and determines appropriate action. Provides service requested or transfers to a specific individual to better assist the member.
- Assists members with inquiries and/or problems – researches and resolves whenever possible.
- Performs transactions on accounts.
- Schedules appointments.
- Provides account information and when appropriate, encourages electronic access to such information, such as CCU Online, CCU Mobile, CCU Talk, and CCU Pay. Gives direction to members to enroll in such services.
- Assists members with troubleshooting and navigating CCU's products and services, including the CCU website and e-services.
- Performs domestic and international wire transfers.
- Learns and keeps up to date knowledge on CCU debit and credit card products and services; assists with related reporting functions as needed.
- Learns and keeps up to date knowledge on fraud trends; monitors account and assists members through fraudulent or suspected fraudulent activity as needed.
- Communicates to members in a professional, courteous manner through various communication channels, including phone, emails, and other messaging/communication platforms.
- Learns and keeps up to date on all CCU products and services.
- Educates members on products, services, fees, and policies; promotes and cross-sells CCU products and services based on member's needs.
- Displays a commitment to giving members the highest quality service. Promotes member service to all employees.
- Maintains orderly files on work with complete and accurate details of all correspondence.
- Safeguards member confidentiality.
- Performs any other duties as assigned.

Additional Duties and Responsibilities:

- Commits to CCU's mission, vision, and core values and model of Service Excellence. Lives and displays these values in all aspects of work and personal life.
- Keeps current in field by reading published information and attending authorized seminars and conferences. Occasional out-of-town travel.
- Participates in training sessions and online courses as needed.
- Participates in regularly scheduled departmental meetings and coaching sessions.
- Gets involved in professional and/or community activities to make a contribution to local community/profession and to be visible in the community.
- Represents the department on committees that may be formed and/or at various CCU events.
- Works on assigned Saturdays throughout the year.
- Other job-related duties may be necessary to carry out the responsibilities of this position.

Performance Expectations:

- Communicates with members in a friendly, professional, manner.
- Gives all members their full attention during each interaction; does not attempt to multi-task with other duties or transactions while helping a member.
- Demonstrates accuracy and thoroughness and promotes this attribute to all employees.
- Performs all duties in compliance with CCU policies and procedures.
- Complies with Bank Secrecy Act requirements; always maintains the integrity of our confidentiality policy.
- Maintains a positive, professional appearance and attitude with members and co-workers.
- Develops and maintains positive working relationships with other employees; promotes teamwork concept.
- Maintains a neat workspace.
- Is punctual and reliable.
- Asks for help when necessary.

Knowledge, Skills, and Abilities:

- Excellent communication, customer service and relationship building skills.
- Basic mathematical skills.
- Basic computer skills, including Microsoft Office.
- Ability to operate general office equipment.
- Related financial background or call center experience is preferred but not required.

Work Relationships and Scope: Reports directly to the Member Contact Center Manager. This position works closely with other Member Contact Agents and interacts regularly with a range of other CCU employees, members, and non-members. They have frequent access to confidential member information.

Working Conditions: Work is performed largely in a pleasant, shared office environment with minimal chance for personal injury. The noise level can range from moderate to substantial at times. There may be occasions when the work environment is stressful. Work hours will normally be from Monday through Saturday and may change depending on our needs or due to special projects, deadlines, and other concerns. Physical requirements include the ability to sit or stand for extended periods of time. Some walking, bending, stooping, and lifting of light materials is required. Frequent mental and visual concentration required for computer usage. Must be able to regularly wear a Bluetooth earpiece and operate a multi-line phone system. Other equipment that may be used includes copy machine, calculator, computer, fax machine, and other office and financial institution equipment.

Acknowledgment: This position description describes the general nature and level of work performed by the individual assigned to this position and should not be interpreted as all inclusive. It does not state or imply these are the only duties and responsibilities assigned to the position. The employee may be required to perform other job-related duties. All requirements are subject to change and to possible modification to reasonably accommodate individuals with a disability.

This position description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the position change.