

**Job Title:** Member Contact Center Manager**Reports To:** Vice President Branch Operations**Status:** Exempt**Date:** April 2025

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**Position Summary:** Manages the day-to-day operations of the Member Contact Center. Supervises, guides and coach's employees, acts as a go-to for complex transactions and sensitive member relations situations. Performs all Member Contact Agent functions as needed. Ensures high-quality member service and team performance.

**Principal Member Service Duties and Responsibilities:**

- Supports Member Contact Agents by answering questions, solving problems, helping with complex transactions and sensitive member relations situations, and explaining policies and procedures to Member Contact Agents and members.
- Researches and resolves escalated or more complex member interactions, questions, problems, or complaints to ensure proper resolution and member satisfaction.
- Compiles necessary departmental reports on a regular basis, including but not limited to phone reports, wire hold reports, debit and credit card reports, etc. Provides reports to appropriate departments.
- Assists in compliance research and audits as needed.
- Oversees functionality of phone system. Ensures phone messages are accurate and updated in a timely manner as needed, agents are set up appropriately, assist with phone system functionality issues as needed.
- Understands and can perform all required duties and responsibilities of a Member Contact Agent.
- Acts as a backup for Member Contact Agents as needed depending on staffing. Including but not limited to back up on answering phone calls and assisting with member inquiries and transactions, scheduling appointments, debit and credit card duties, etc.
- Maintains up to date departmental processes and procedures for duties including but not limited to wires, credit and debit cards, member profile changes, online services, and more.
- Processes incoming and outgoing domestic and international wire transfers; acts as the department go-to for wire transfer procedures.
- Learns and keeps up to date knowledge on CCU debit and credit card products and services, processes, and procedures. Acts as department go-to for debit and credit card topics.
- Assists with functionality of online and mobile services as it relates to the member contact center. This may include but is not limited to approving escalated member requests, managing users, and other administrative duties related to CCU Online, CCU Mobile, CCU Pay, etc.
- 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 members' needs.
- Displays a commitment to giving members the highest quality service. Promotes exceptional service to all employees.
- Maintains knowledge of all State and Federal regulations that are applicable to the transactions performed in the Member Contact Center.
- Any other duties as assigned.

### **Principal Supervisory Duties and Responsibilities:**

- Creates and maintains the monthly Member Contact Center schedule and assigns daily work to Member Contact Agents.
- Approves timecards for employees he/she supervises in a timely matter for payroll purposes.
- Creates and maintains a positive team environment and employee relations.
- Holds regular huddles and staff meetings to discuss areas needing improvement, changes in procedures, new developments of services, and other general information.
- Holds regularly scheduled one-on-one coaching sessions with each team member he/she supervises.
- Assists Human Resources in the recruitment and selection of applicants for employment vacancies in their department.
- Ensures staff are trained and cross-trained in all phases of their jobs and in all credit union products, services, and policies to ensure the highest quality of service to members and compliance with credit union policies and procedures.
- Analyzes training needs and coordinates with Human Resources and/or the Member Service Specialist on appropriate training programs that address those needs.
- Conducts training with employees as needed to ensure staff have all the tools necessary to be successful in their role and reach their full potential.
- Encourages and assists staff members in the optimum utilization of their skills and abilities in meeting CCU vision and objectives.
- Assists Human Resources in investigating and taking appropriate action to resolve performance conflicts and problems; documents these events.
- Evaluates the job performance of staff to ensure quality of work and service to members.
- Manages and recommends the purchase of equipment and supplies.
- 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, including supervisory development training.
- Gets involved in professional and/or community activities to contribute 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.
- Depending on branch location, branch staff, and other factors, other job-related duties may be necessary to carry out the responsibilities of this position.

### **Performance Expectations:**

- 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 maintain 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.
- Gives all members their full attention during each interaction; does not attempt to multi-task with other duties or transactions while helping a member.

- Maintains a neat workspace.
- Is punctual and reliable.
- Asks for help when necessary.

**Knowledge, Skills, and Abilities:**

- Effective leadership, problem solving and organizational skills.
- Ability to build positive supervisory relationships with a variety of people.
- Excellent communication, customer service, and reasoning skills.
- Call center or related financial background is preferred but not required.
- Strong supervisory experience is preferred but not required.
- Excellent computer skills, including Microsoft Office.
- Basic mathematical skills.
- Ability to operate general office equipment.

**Work Relationships and Scope:** This position reports directly to the Vice President Branch Operations. This position supervises and interacts regularly with the Member Contact Agents. They regularly interact with a range of co-workers and credit union 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.