

# **THE SUMMIT FEDERAL CREDIT UNION**

## ***MEMBER SERVICE CENTER REPRESENTATIVE***

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### **I. Basic Functions:**

The primary function of the MSR is to establish a positive rapport with members that leads to a loyal and satisfied membership. The MSR will process transactions requested by members who conduct business with the credit union via telephone, e-mail and U.S. Mail. The MSR will utilize cross-selling techniques to inform members of the features and benefits of the products and services which we offer.

### **II. Essential Functions:**

- Provide professional service to all members via multiple medias
- Promote and cross-sell all credit union products and services
- Process file maintenance
- Maintain minimum performance goals which are established by management

### **III Other:**

- Adhere to credit union and department policies and procedures
- Participate in special assignments and projects as requested by management
- Work overtime as requested by management

### **IV Qualifications:**

#### **Skills:**

- Excellent communication skills (both oral and written)
- Excellent interpersonal skills
- Possess organizational skills
- Possess a strong attention to detail

#### **Abilities:**

- Ability to maintain composure while dealing with stressful situations
- Ability to work varying hours, including evenings and weekends
- Ability to work in a team environment

#### **Knowledge:**

- Possess a high school diploma or equivalency
- 1-2 years experience in customer service or sales is desirable
- Knowledge of Microsoft Word, Excel and Windows software

**V Work Environment**

- Be able to sit for extended periods of time
- Must be able to utilize/view a CRT and/or monitor for an extended period of time
- Must be able to frequently use a keyboard to enter data