



Job Title	Virtual Representative
Reports To	Contact Center Manager

PURPOSE

This position is responsible for performing Interactive Teller Machine related functions for member accounts. Tasks include deposits, withdrawals, transfers and answering basic inquiries in accordance with the Credit Union’s established policies, procedures, and core values. In order to achieve the objectives of the Credit Union, these responsibilities shall be executed promptly, courteously, and accurately.

FUNCTIONS

- Responsible for member marketing of the Credit Union and to maintain knowledge of all services offered in order to support the credit union’s Vision and Core Values.
- Responsible for basic and complex member service directed Interactive Teller Machine transactions related to member accounts. Including but not limited to; share deposits by check, share deposits by cash, share cash withdrawals, share transfers, and loan payments.
- Responsible for basic and complex member service directed Interactive Teller Machine inquiries related to member accounts. Including but not limited to; Account information of loans, shares, share drafts, share certificates, money market accounts, IRAs, Share rates, lending rates and terms, and a basic understanding of shared branching with limited supervision.
- Responsible for receiving and responding to member inquiries including but not limited to; chat, email, fax, interactive member chat, online message board, phone, and text messaging inquiries.
- Responsible for knowledge and compliance to procedures and policies contained in all manuals pertinent to job duties. In addition, responsible for maintaining familiarity and compliance to regulations pertinent to job responsibilities.
- Comply with corporate appearance standards related to on-camera member service (as described under ‘prerequisites for the position’ below).
- Responsible for initiating outbound calls to current members and potential members utilizing pre-determined scripts.
- Exercising independent judgment within authority in regards to problem resolution.
- Perform other duties as assigned.

AUTHORITY

The incumbent is authorized to take any action necessary to carry out the responsibilities assigned by the Contact Center Manager so long as such action does not deviate from established policies and represents sound business judgment; except for specific limitations placed on the incumbent by the manager or by direct assignment to other personnel.

REQUIRED SKILLS, KNOWLEDGE, AND ABILITIES

- Basic computer skills
- Typing skills (60wpm minimum)
- Outgoing and energetic attitude
- Excellent problem-solving capabilities
- Attention to detail
- Ability to multi-task
- Ability to communicate effectively both verbally and in writing
- Adaptability to changing technology
- Ability to follow instruction

PREREQUISITES FOR THE POSITION

- **Minimum Education:** High school graduate or equivalent.
- **Minimum Experience:** One (1) year general office record keeping with public contact and problem solving. Six (6) months member service experience in a financial institution. Prior experience with MVFCU may be considered in lieu of a portion of the above experience.
- **Personal Characteristics:** Must be of the highest integrity, be in good health, and with personal habits above reproach. Must practice confidentiality. Must be a mature person with sound judgment. Must have the ability to meet and work effectively with people of varying levels of education and experience and be able to communicate, both written and orally with same. Must have a high degree of self-motivation, and organizational skills with the ability to work independently and making sound decisions. Must be able to take directions and seek the council of supervisor as necessary.
- **Working Conditions:** Continuous alertness, precision, and concentration to ensure accuracy and thoroughness of documents and transactions. This position may require extended or irregular hours. Continuous standing and/or sitting for long periods of time when performing other duties related to the position. Must be able to lift 40 pounds.
- **Virtual Appearance Standard:** Business casual (Section 804 of Employee Handbook) with a designated MVFCU logo wear shirt approved for on-camera member service. The MVFCU logo must be visible at all times. Jewelry to be small and simple. Hair neatly styled and pulled back and away from the eyes.

Employee Signature

Date

Supervisor Signature

Date