

## UNITED SOUTHERN BANK

**Job Title: Customer Care Representative**

**FLSA status: Non-Exempt**

**Department: Operations**

**Reports to: Customer Care Supervisor**

**Position summary:** The Call Center Representative provides a wide variety of banking services to customers and refers financial services to meet customers' diverse needs. The Call Center Representative will act as a resource to all staff and customers.

### **Role qualifications:**

- Knowledge of financial services specific to United Southern Bank including; Online banking for Business and Personal, Mobiliti, Bill Pay, Debit Cards and Deposit Accounts
- Knowledge of online services specific to United Southern Bank including; Business Online Banking, Personal Online Banking, Business Mobile, Personal Mobile
- Understanding of legal and regulatory requirements for depository accounts and teller transactions also including; Stop Payments, Disputes, Business Online Banking, Return Mail, Address Changes, Dormant Accounts, Wire Transfers and Holds.
- Knowledge of USB procedures
- Projects a professional image in dress, manner and communication

### **Position responsibilities:**

- Provide a wide variety of banking services to customers and refer financial services to meet customers' diverse needs.
- Provide direction to CSR's and Tellers by transferring product knowledge and guidance in solving customer inquiries.
- Cross sell banking products such as retail investment, trust services, residential lending and other banking products suitable for customer needs.
- Answer inquiries and refer customers for appropriate services
- Verify and process changes to existing accounts
- Perform other related duties as assigned.
- USB employees are expected to comply with all BSA and Compliance regulations, rules, acts & laws.

### **Essential skills and experience:**

- Excellent phone skills
- Quality customer service delivery
- Ability to work and make decisions independently
- Problem solve through research on Director, Navigator and other sources
- Good organizational skills
- Excellent interpersonal and communication skills
- Maintain a strong working partnership with all bank departments
- Work in a fast-paced environment with ability to meet scheduled deadlines
- Multi-task and prioritize workflow
- Proficient in Navigator
- Perform proactively
- Problem Solve
- Proficient in Office Applications
- Strong Computer Skills

**Physical demands and work environment:** The physical demands and work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally required to walk; sit; use hands and fingers to handle, or feel objects, tools, or controls; reach

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with hands and arms; balance; stoop; talk or hear. The employee must occasionally lift and/or move up to 15 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.