

Member Services Representative
IDB Global FCU Member Service Back Office Department

Job Description

Full-time position

MS Back-Office Supervisor

Location: HQs

Objective

The Member Service Representative is responsible for answering/processing incoming member requests via email, calls or ticklers regarding member accounts, transactions, and automated services using a consultative approach to assist members and uncover needs that lead to the cross selling of IDB Global FCU services. Overall, the Member Service Representative will assist both the front and back office member services teams depending on the changing demands and workloads. In the future, this role can potentially become a permanent call center associate role, assisting the front-line member services team only as a backup.

Key responsibilities include, but are not limited to:

- Handles all incoming calls, emails and ticklers in a timely manner
- Responsible for the opening of all account opening requests submitted in-branch and via the IDB Global FCU website; to include all follow-ups necessary to ensure an efficient process for prospective members.
- Responds to member inquiries professionally by providing thorough and accurate information
- Processes member requests and resolve their issues utilizing the applications that you are given access to
- Conducts research to fully understand the cause of members' issues and provide a solution
- Identifies cross-selling opportunities and provide the necessary information so members can apply for CU products and services
- Connects members with the appropriate credit union representative when necessary
- Conducts outgoing and follow up calls to address missed incoming calls
- Retrieves department voice mail messages and conducts a follow up call to address the reason of the call

- Keeps up with IDB Global FCU's product offerings, campaigns, events, procedures, and policies
- Educates members on the benefits and features of IDB Global FCU products and services and communicate current marketing promotions and events
- Reaches and maintains target goals for individual and group performance and customer service satisfaction set by management
- Assists Manager(s) with projects as assigned
- Serves as Wire Operations Back-Up

Requirements:

- High school diploma or General Education Degree (GED) required, college education preferred
- Spanish/English fluency required
- Excellent communication and writing skills in Spanish and English
- Proficient using a PC and Microsoft Suite and ability to navigate multiple computer systems and programs
- Previous credit union or banking experience preferred
- Previous telemarketing experience a plus
- Strong organizational, communicative, and problem-solving skills as well as attention to detail
- Ability to multitask and thrive in a high-paced, high-pressure environment
- Proactive and team-oriented