



## **JOB DESCRIPTION**

**JOB TITLE:** Call Center Representative  
**REPORTS TO:** Account Services Officer

### **GENERAL SUMMARY**

The Call Center Representative is a vital part of the bank's internal and external communications. The incumbent utilizes the telephone system and the network to maintain the flow of information; answers customer service inquiries; utilizes knowledge based on experience in exercising discretion and judgment in interpreting policies and procedures and making exceptions as required.

### **ESSENTIAL JOB FUNCTIONS**

- ☐ Enthusiastically answer incoming calls in a prompt, courteous manner and relay calls to the appropriate person as needed. Phone hours are 8:00 AM – 4:35 PM M-F & 8:00 AM – 5:00 PM on Friday.
- ☐ Qualify calls for executive management and relay messages in a timely manner
- ☐ Ensures prompt, efficient service to customers, while utilizing tact and knowledge to resolve customer complaints and explain specific policies and procedures
- ☐ Monitor the after hours voice mail box each morning and relay messages to appropriate staff
- ☐ Maintain and update (with the assistance of IT and HR) the internal phone extension list for all branches
- ☐ Assist customers with consumer online banking questions (OLB) and respond to secure messages and customer inquiry emails
- ☐ Assist customers with consumer OLB bill payments, process hold notifications, and review the daily bill pay file
- ☐ Complete customer service requests such as: ACH disputes, Reg E disputes, stop payments, travel instructions, check orders, address changes, and debit card maintenance
- ☐ Process returned mail and maintain address changes
- ☐ Daily review of Verafin, Risk Review and Account Services reports
- ☐ Perform account maintenance and enter cross application entries as needed
- ☐ Process requests for verification of deposits such as Social Security, Medicaid, other financial institutions (FIs), etc.
- ☐ Practices diligence with duties involving Bank Secrecy Act compliance by reporting suspicious activity
- ☐ Provides backup in absence of other department staff
- ☐ Regular and reliable attendance

### **OTHER FUNCTIONS**

Candidates who cannot perform some or all of these duties because of disabilities will nevertheless receive full consideration for the job based on their ability to perform essential functions.

- Uses word processing and spreadsheet software to prepare updates of various management reports, prints reports, and distributes as instructed.
- Reports problems with communication equipment to management.

### **MINIMUM REQUIREMENTS**

The following are required to enable job holders to perform the essential functions of the job.

### **SKILLS & KNOWLEDGE**

1. Knowledge of function of all bank employees and departments.
2. Strong knowledge our core system (JH SilverLake).
3. Understanding of bank products and services.
4. Pleasant voice, good enunciation.
5. Friendly, courteous, and polite demeanor.
6. Strong organizational skills.
7. Able to manage multiple phone lines while performing other duties.
8. Excellent interpersonal skills.
9. Able to react quickly and appropriately to telephone requests.
10. Able to remain calm and polite under stress.

### **EXPERIENCE/EDUCATION**

High school diploma or equivalent. 1-2 years experience with telephone and/or front line customer service preferred. Prior banking experience is preferred.

To apply for this position, download and save the Application Form located on our Careers page. Once completed, please send the Application by attaching it in an email to: [careers@fnboxford.com](mailto:careers@fnboxford.com).

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