

University of Illinois Community Credit Union

Structured Compensation - Job Description

E-Services Rep

Data Year: 2023

Prepared On: 06/05/2023

Department:	Member Experience	Grade:	8
Reports To:	AD E-Services	Classification:	Non-Exempt
Supervises Direct:	0	Supervises Indirect:	0
Approved By:		Effective Date:	01/01/2010
		Revised Date:	06/07/2022

Role:

An E-Services Representative is a financial coach that listens to our members needs. E-Services looks out for our member's best interest and offer solutions to improve their financial life. E-Services will act on our value proposition and be easy to work with.

As the face of our organization an E-Services Representative will:

- Build member loyalty
- Provide solutions for internal and external members
- Build and maintain product knowledge
- Focus on compliance and security

Essential Functions & Responsibilities:

- N 0% Consistently provide outstanding service focusing on member service and member loyalty skills
- N 0% Efficiently serve members to ensure timely and quality service.
- N 0% Consistently identify the needs of members and recommend appropriate credit union solutions in order to build member loyalty and meet or exceed organizational goals
- N 0% Assist members with account needs, answer questions about products and services and resolve problems that are within their authority to resolve. Refer problems that are beyond their authority to appropriate team members along with their recommendations.
- N 0% Own internal and external member problems, issues and complaints and ensure the appropriate follow up to achieve proper resolution

Performance Measurements:

1. Consistently meet all service standards when delivering both internal and external service as measured by internal service monitoring.
2. Continuously meet and/or exceed established goals and objectives identified in the annual performance goal document for this position. Support credit union initiatives to achieve desired balanced scorecard results.
3. Actively participate and complete all required training courses for this role and achieve a passing score on all job related assessments.
4. Maintain a thorough knowledge of credit union's product and services as well as compliance items (HR/BSA/AML and OFAC) through self-study and available training and development opportunities. Must receive passing score on all required assessments.

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5. Maintain appropriate level of attendance and timeliness to ensure the highest level of service to both internal and external members. When possible, absences should be scheduled in advance.

Knowledge and Skills:

Experience Three years to five years of similar or related experience.

Education A high school education or GED.

Interpersonal Skills Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.

Other Skills

Physical
Requirements

Work Environment

This Job Description is not a complete statement of all duties and responsibilities comprising the position.

Printed Employee Name

Date

Employee Signature