



Position Description
Client Care Representative

Department: Client Care Center

Location: TBD

Job Responsibilities: Serves customers by determining needs and taking next steps to meet those needs; answering inquiries; resolving problems; fulfilling requests; maintaining database.

Essential Job Duties:

- Professionally engages with customers/clients to identify their needs
- Answers inquiries by clarifying desired information; researching, locating, and providing information.
- Resolves problems by identifying and clarifying issues; researching and exploring answers and alternative solutions; implementing solutions; escalating unresolved problems.
- Fulfills requests by clarifying desired information; completing transactions; forwarding requests.
- Sells additional services by recognizing opportunities to up-sell accounts; explaining new features.
- Maintains call center database by entering information accurately and efficiently.
- Serves as a key resource and support for Branch Operations teams, in particular in relation to opening new accounts and account maintenance functions
- Adheres to security and transaction processing by following established procedures; reporting malfunctions.
- Updates job knowledge by participating in educational opportunities.
- Takes initiative to learn and develop broader knowledge and skills by maximizing tools available such as CFT and Regulatory University courses and offerings through the OBL and ABA.
- Maintains a professional image both in appearance and conversation.
- Responsible for learning all duties within the department.
- Ability to work two Saturdays a month

Skills and Qualifications:

- Verbal Communication
- Telephone Skills
- Listening Skills
- Data Entry Skills (Microsoft Word, Microsoft Excel & Windows)
- Internal and External Customer Focus
- Attention to Detail
- Professionalism
- Ability to multi-task in an efficient and productive manner
- Team player and People/Interpersonal Communication Skills
- Problem solving skills

Education/Experience:

- High School diploma or GED equivalent required.
- Customer Service or Banking/Branch Operations experience (preferred)