

Job Title: Call Center Account Services Manager Ref # 11226687  
Location: FWB Operations Center

Primary Duties:

1. Supervises all personnel within Account Services and Support Services. Maintains the quality and progress of work. Decides questions of established work method and workflow. Assigns, directs, coordinates, and reviews work. Makes temporary personnel shifts within the branch when there is a staff shortage.
2. Ensures telephone equipment and software are in efficient and proper working condition, and overflow calls are transferring as designed. Notifies CO-OP Member Center of new products and services, campaigns/promotions, business interruptions, or procedural changes that may prompt or increase member telephone contact. Reports any issues to Call Center Operations Manager and SVP Information Technology.
3. Resolves member problems, whenever possible, to the satisfaction of the member and the Credit Union. Keeps the Call Center Operations Manager advised at all times of member complaints or potential complaints.
4. Promotes and cross-sells all credit union products and services and meets established Credit Union goals.
5. Ensures proper controls and accountability for controlled items are maintained in accordance with applicable regulations and policies. Serves as administrator, establishing, editing and removing user access to Call Center related third party service providers.
6. Oversees department balancing and analyzes teller reports to ensure accuracy.
7. Authorizes exceptions to normal credit union policies and procedures when circumstances warrant and where deviation is justified.
8. Recommends alterations and revisions to departmental policies and procedures to the Call Center Operations Manager.
9. Presents to staff and monitors their performance with new programs, policies and procedures initiated by the Credit Union.
10. Responsible for new employee orientation and ensures that all employees are thoroughly trained in all phases of their particular job. Holds regularly scheduled ongoing employee training meetings. Ensures all employees complete required compliance training.
11. Holds periodic meetings with department employees for discussing areas needing improvement, criticisms, changes in procedures, education, and for purposes of keeping department employees informed of overall Credit Union policies.
12. Monitors calls and provides feedback, development and coaching on a regular and ongoing basis. Evaluates work performance of department supervisors and employees. Recommends promotion to the Call Center Operations Manager.
13. Approves all sick leave, annual leave, administrative leave and overtime for branch personnel; coordinates all leave with the appropriate supervisor. Verifies, edits and

corrects time in ezLabor (time attendance system) for branch personnel.

14. Conducts research and projects on subjects deemed important to the membership or as requested by the Call Center Operations Manager.
15. Ensures that proper housekeeping of work areas, desks, equipment, etc., within the Branch is carried out. Keeps employees supplied with sufficient supplies and forms to carry on day to day business. Implements and maintains Branch Safety Rules.
16. Represents EFCU at Chamber of Commerce meetings or other public functions as requested by Call Center Operations Manager.
17. Performs other duties as assigned.

**REQUIREMENTS OF POSITION:**

Must be bondable.

Must complete annual training and review applicable SOP's 509, 509a, 521 and comply with all regulatory monitoring, record keeping and reporting requirements.

Must have 3 to 5 years credit union or related experience, with a minimum of 2 years managerial or supervisory experience.

Must possess a B.S. Degree in Accounting, Finance, Management, Business Administration or other business related field.

Must have the ability to tactfully supervise employees while maintaining the ability to motivate them.

Must be able to converse with members and employees in person or over the phone, in a courteous, pleasant, professional and efficient manner.

Must be thoroughly familiar with EFCU policies, Accounting, Bylaws, and Rules and Regulations and have the ability to interpret and apply same.

Must be well versed in information gathering techniques and have the ability to express ideas both orally and in written form.

Must be familiar with EFCU's computer system, Windows and Microsoft Office software, and telephone software.

Must report to work regularly and on time.

Must be able to get along well with others.