

5739 CALL CENTER LOAN REPRESENTATIVE – SANTA MARIA, CA

Our client has an exciting opportunity for a Call Center Loan Representative at their Santa Maria Operations Center!

You will be responsible for servicing the financial needs of clients through all Customer Care communications channels, web chat and phone, while actively contributing to the achievement of the department referral and service goals.

Provide outstanding customer experiences by consistently providing premier customer service and professional resolution of problems/issues.

Handle a variety of customer service and referral calls and chat interactions in a prompt and courteous manner to meet and exceed established goals. Use your knowledge of bank products and services and effective skills to identify and make referrals to meet customers' needs.

Perform calls and chats and completes transactions in compliance with regulatory and bank policies and procedures with adherence to bank security policies and confidentiality of bank records and customer information.

- Supports the contact of bank customers and prospects through phone or electronic and chat channels to market an array of financial products and services.
- May be required to support other sales channels with opening of new accounts or assist callers with obtaining services through the appropriate banking departments.
- Utilizes chat library and other tools to communicate with customers in accordance with the bank compliance and other processes. Meets required referral goals per day or work shift. Identifies cross-selling opportunities and recommends other banking products to existing customers.
- Provides telephone support for customers requiring assistance with both traditional and electronic banking products. Uses effective and professional telephone skills in receiving and responding to all types of customer telephone inquiries, providing information on bank products, policies, procedures and programs.
- Maintains a solid understanding of the products and services being offered. Uses judgment and reasoning skills to solve customer service problems within designated authority to handle chats or calls at point of contact.
- Collects information about service problems or customer complaints and escalates customer disputes to the appropriate manager for resolution if necessary. Completes research and resolves documentation errors or discrepancies.
- Forwards more complex problems to management, as required. May be required to open accounts or set up banking services and perform maintenance functions. Performs data processing related duties including data entry and data retrieval.
- Performs other operational support tasks as required. Completes reports of completed chats or calls or other data, as required, accurately and timely.
- Maintains accurate, thorough and concise customer communications records. Assists other departments as necessary.
- Communicates and interfaces with other departments to resolve customer relations issues. Follows up on progress of resolution to ensure customer satisfaction.

QUALIFICATIONS:

Minimum of 2 years as a Call Center Representative with referral and service functions, or Customer Service representative or Financial Service Representative in a Financial Institution, with demonstrated communication skills and telephone aptitude.

- Pervious loan experience required.
- Good knowledge of bank operations, retail banking products, and banking regulations pertaining to financial transactions is highly preferred.
- Strong proficiency with MS Word, MS Excel, MS Outlook.
- Minimum typing speed of 50 WPM.
- Possess excellent human relations and communications skills.
- Possess friendly demeanor, can-do attitude, and willingness to help at all times.
- Use questioning and listening skills that support effective telephone communication.
- Identify and use voice skills to enhance telephone presentation.
- Able to cope with pressure resulting from meeting required productivity levels and deadlines.

- Able to protect and maintain confidential information.
- Professional in appearance and in verbal communication.
- Demonstrate teamwork in facilitating workflow. High level of cooperation with others and responsive to the Bank's needs.
- High level of accuracy and great attention to detail.
- Consistently demonstrate tact and discretion.
- Demonstrate excellent customer service skills.
- Able to comprehend and interpret Bank policies and procedures.
- Knowledge of or ability to learn retail products and services.

POSSIBLE RELOCATION ASSISTANCE FOR THE RIGHT CANDIDATE

SEND RESUME AS AN MS WORD ATTACHMENT TO diane@dmstone.com