

Job Title:	Customer Care Representative/Sales Associate	FLSA:	Non-Exempt
Division:	Banking	Revision Date:	05/12/2020

Position Purpose:

Provides Midwest Heritage customers an exceptional customer service experience through telephone, online chat, video and email interactions. This position responds to banking customer inquiries, markets additional services, redirects incoming communications to the applicable department, proactively contacts customers as applicable and performs requested customer service maintenance for assigned online channels. This position is also responsible for teller and personal banking functions.

Hours: The Customer Care Center has extended hours from 7:00 AM to 7:00 PM Monday through Friday, 8:00 AM to 5:00 PM on Saturday's and 9:00 AM to 3:00 PM on Sunday's. Customer Care Representatives will be expected to work the various shifts on a rotating basis.

Essential Functions:

- Provides first-class service by communicating with customers by telephone, chat, email, or other channels to respond to inquiries and service requests, resolve issues, and provide information about Midwest Heritage services.
- Process service maintenance requests for the online banking channels, including, but not limited to, Consumer eBanking and mobile, Business eBanking and mobile, Online Account Creation, ACH origination, remote deposit and Health Savings Accounts (HSA).
- Monitor banking systems and reports to identify incomplete or erroneous items. Contact internal departments, vendors, or customers to verify information and take necessary steps to correct or complete transactions.
- Based on customers' existing services and needs, promote additional Midwest Heritage banking, financial and insurance services.
- Track issues and statistics to assist management in analyzing activities, challenges, and opportunities.
- Provide back up for other members of the team.

Sales:

- Responsible for completing in-aisle walks and PA announcements as required. (Retail Locations)
- Increase account relationships of existing bank customers and attract new customers by introducing them to new products and services.
- Successfully achieves all sales goals on a continuous basis.

Operations:

- Processes all types of teller transactions as well as maintains and balances a cash drawer daily.
- Maintains knowledge, skills, and abilities in regard to Midwest Heritage products and services by participating in on-going training and staying aware of internal communications.

- Assists the Operations Supervisor in clerical support including filing, ordering supplies, maintain office records, and preparation of reports.
- Successfully achieves all operations goals on a continuous basis.

Customer Service:

- Ensures that customers are satisfied with the products and services that they obtain.
- Proactively and professionally communicates with customers regarding their financial needs.

Secondary Duties and Responsibilities:

Performs other job-related duties and special projects as required.

Knowledge, Skills, Abilities Required:

- Commitment to the Midwest Heritage mission and willingness to promote the values of the organization.
- Excellent organizational and time management skills.
- Strong customer service and interpersonal skills; ability to relate to and interact with people in a positive, friendly and professional manner
- General computer proficiency (Experience with Microsoft Office programs such as Word, Excel, and Outlook preferred)
- Strong written and verbal communication skills
- Basic problem solving skills
- Basic proficiency with information systems

Education, Experience, and Other Requirements:

- Minimum Education: High school diploma or equivalent.
- Minimum Experience: One plus year(s) of customer service, banking or related experience.

Reporting Relations:

Accountable and Reports to: Operations Supervisor

Supervisor Responsibilities: None

Working Conditions and Physical Requirements:

- The duties of this position are normally performed in a general office setting. This is a fast paced work environment.
- This position is classified sedentary/light and requires the ability to sit for long periods of time.
- There is frequent pressure to meet deadlines and handle multiple projects in a day.
- Visual requirements include: ability to see detail at near range with or without correction.
- Must be able to perform the following physical activities: sitting for long periods, talking (in person and by telephone), hearing and repetitive motions.

Travel:

Minimal

Equipment Used:

Computer (PC with Microsoft Office programs), telephone, calculator, telephone, copier, fax, and printer.

Other Position Requirements:

Contacts: This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

Confidentiality: This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

Employee Name (please print)

Signature of Employee

Date