

OPPORTUNITY BANK OF MONTANA

JOB DESCRIPTION

Job Title: Customer Care Agent I

Position Summary: Responsible for providing friendly, competent, and professional service to customers and prospective customers via inbound telephone and electronic channels such as email and chat. Provides a wide variety of support and knowledge to ensure customer needs are met efficiently and effectively. Performs duties under close supervision.

Core Competencies

Demonstrated ability:

- To maintain confidentiality
- To provide excellent customer service, including problem resolution
- To handle stress and meet deadlines/goals
- To work independently and as a team member
- To perform basic math functions
- In attention to detail and accuracy
- In navigating multiple computer systems and various applications including Microsoft Office Suite
- In oral and written communication
- In interpersonal skills
- In judgment and decision-making
- In analytical and problem-solving skills
- In time management

Physical Requirements

Ability to:

- sit for extended periods of time
- use telephone frequently
- extensive use of computer screen
- normal or correctable to normal vision and hearing
- reach, stand and walk on frequent basis
- lift and carry up to 20 pounds on occasional basis
- kneel, crouch, and climb on occasional basis

(Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions)

Environmental Demands

Exposed to potential hazard of robbery – position receives detailed instructions to minimize risk

Education and Experience Requirements

High school diploma or equivalent

Education and Experience Preferences

6 months previous banking or general office experience
General knowledge of computer systems and software.

Licensing/Certification Requirements

Other Requirements

FLSA Status

- Eligible for overtime pay
- Exempt from overtime compensation

Classification Level

Wage Band A

Work Hours

Typical schedule may be varied and flexible Monday-Friday between 7:30 a.m. – 6:30 p.m. with flexible hours as needed during peak times, vacations, and sick leave. Some job positions regularly work Saturday shifts and supervisor will advise if applicable to this job position.

Employee may also be required to work extended hours on an occasional basis to fulfill job duties and responsibilities as outlined in Essential Functions & Key Areas of Responsibility.

Essential Functions & Key Areas of Responsibility

- Respond to all inbound phone, email and chat inquiries regarding Deposits, Loans and Services while upholding the Contact Centers service level agreements, all laws, rules, and regulations.
- Provide technical support and troubleshoot the Bank’s digital products, including but not limited to online banking, mobility, and bill pay.
- Document all telephone calls, chat conversations and email information according to standard operating procedures.
- Utilize listening, communication, and problem-solving skills with the ability to assist with researching and resolving customer issues.
- Navigate multiple computer systems while interacting with customers.
- Maintain a good understanding of account maintenance, online banking, and debit card policies, along with other banking products.
- Understand and maintain compliance with Bank policies and procedures, along with applicable laws and regulations.
- Identify and recommend solutions to resolve customer issues; when appropriate understand the need to escalate to the appropriate department or manager.
- Perform other related duties as assigned.

Disclaimer: The information portrayed on this job description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of the employees assigned to this job.

Employee Signature _____ **Date** _____