



# Example of Contact Representative Job Description

Powered by [www.VelvetJobs.com](http://www.VelvetJobs.com)

Our innovative and growing company is looking to fill the role of contact representative. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for contact representative

- Answers general questions regarding portal navigation and HR/Payroll policies and procedures, referring to an online knowledge base for information and guidance
- Assist Senior Representatives, Supervisors and Managers with day-to-day execution of duties and support the team regarding proper procedures, policies, and requirements
- Understand and apply deposit account policies and procedures, including utilizing new deposit account opening software system, adhering to regulation and compliance standards and confirming personal information is up to date
- Professionally handle incoming customer chat sessions with the ability to earn the customer's commitment to visit our store through the scheduling of an in-store appointment
- Thoroughly and efficiently gather customer information, assess and fulfill customer needs and educate customer on pricing and options related to available products and services
- Build and maintain effective relationships with customers and store associates
- Focused on meeting and exceeding team and individual performance metrics to drive results
- Support phone queues during peak times, or as needed, to ensure service levels are achieved
- Responsible for member service contacts and inquiries including phone calls

- Requires the ability to consistently apply appropriate administrative and regulatory criteria for reviewing and making decisions on all non-clinical appeals and validating the accuracy of all received information

### **Qualifications for contact representative**

- Bilingual Spanish to English is Preferred
- Previous experience operating switchboard is preferred in order to manage the volume and call types received
- Be a self motivated team player who has the ability to make decisions
- Proficient in personal computer applications to include Word while having the ability to learn applications related to identity verification, credit worthiness, account privacy, telephone and online payments, payment verification, customer service information and service order systems
- Able to process information quickly by using several computer applications simultaneously and provide accurate information
- Intermediate level competency in Microsoft Office products, online research and customer service tools