**Job Title:** **E-Services Specialist I**

**Department:** Member Services **Grade:** 7

**Reports To:** Asst Mgr E-Services **Exemption Status:** Non-Exempt

**Supervisory:** No **Date:** 8/26/2022

**Job Description**

The E-Services Specialist is the point person for supporting the Credit Unions Digital Channels and eServices. This includes new account opening and consumer loan applications via Online and Call Center. Taking ownership of the application and member relationship through to new account opening/Loan closing. Responsible for the second level servicing and handling of escalated calls for eService products this includes, Web Chat, Online Banking, Mobile Banking, Bill Pay, Remote Deposit process and External Transfer/PopMoney requests.

**Essential Functions and Responsibilities:** includes the following, and other duties may be assigned.

Serves as a financial advocate/coach for members of the CU. Works with members to explore their financial priorities, and determines helpful and achievable solutions.

* Drive loan and new account volume through member and prospect inbound new account requests, cross selling other bank products and services as appropriate to meet customer needs.
* Serve as a liaison between underwriters and members for application taken in the call center and online applications owning the process through to loan closing and required documentation.
* Conduct loan closings remotely or where member prefers schedule an in branch closing.
* Review membership applications received through Online channels/Mobile Banking.
* Review and process all online requests such as; Courtesy Pay applications, Change of Addresses, Budget applications.
* Assist members and internal resources with troubleshooting the more complex digital services issues. Including Web Chat, Mobile/Remote Banking Issues, Bill Pay and the External Transfer/Popmoney feature.
* Handle member ACH processing issues.
* Point of contact between frontline staff and bill pay vendor for all bill pay issues and research. Work with bill pay vendor to resolve member issues.
* Maintains and continually improves upon in depth knowledge of all credit union products, services, and procedures.
* Assist as needed with training to other employees on eServices products/services as well as managing updates/changes in these products and services.
* Meet or exceed service quality, and productivity goals.
* Comply with all regulatory and compliance related requirements.
* Adheres to all credit union policies and procedures and supports the culture of the organization.
* Manage time appropriately each day in order to follow up with customers and contacts as well as meet deadlines consistently.

**Performance Measurement (if applicable):**

**Qualifications and Requirements:**

* Education: Associates or Equivalent work experience.
* Experience with working with Digital Banking services.
* 1-2 years banking/credit union frontline experience required.
* Ability to synthesize and analyze data to inform appropriate solutions.
* Strong Technical abilities.
* Strong analytical, problem solving and Time Management skills.
* Expertise in Microsoft Office.
* Excellent written and oral communications skills.
* Work as a team player to ensure processing deadlines are met.
* Perform other duties as required by management.
* 40 hours per week, some Saturdays