

Job Title: Receptionist

Reports To: Assistant Branch Manager

Status: Non-Exempt

Date: December 2024

Position Summary: Serves as the first point of contact and “face” of CCU; provides a warm welcome and ensures a positive experience for members and visitors. Assists members in person and over the phone with basic transactions, troubleshooting, and account research. Processes mail and performs various administrative and clerical duties as assigned. Promotes and cross sells CCU products and services to members. Performs all duties in compliance with CCU policies and procedures.

Principal Duties and Responsibilities:

- Greets members, vendors, and other visitors; assesses their needs and assists and directs to appropriate person.
- Assists members with inquiries and/or problems – researches and resolves whenever possible.
- Processes and distributes all mail, interoffice correspondence, and deliveries. Researches and resolves questions on proper distribution.
- Ensures the reception area, lobby, and entranceway of the Black River Fall Main Office maintain a professional, tidy, and pleasant experience for employees, members, and other visitors.
- Answers telephone, disseminate information or resolve questions, and/or route calls to appropriate individual. Put calls on hold and coordinate follow through so caller is handled as promptly as possible and/or put into voicemail or take message at caller’s request.
- Performs basic transactions on members’ accounts as needed. This may include but is not limited to researching account transactions or history, transfers, loan payments, adding share accounts or CDs to an existing membership account, etc.
- Provides account information and when appropriate, encourages electronic access to such information, such as CCU Online, CCU Mobile, CCU Talk, and CCU Pay. Gives directions to members to enroll in such services.
- Assists members with troubleshooting and navigating CCU’s products and services, including the CCU website and e-services.
- Assists members with accessing their safety deposit boxes.
- Prints debit and/or credit cards for members as needed.
- Schedules appointments for various CCU employees.
- Learns and keeps up to date on all CCU products and services.
- Educates members on products, services, fees, and policies; promotes and cross-sells CCU products and services based on member’s needs.
- Provides administrative and clerical support for the Black River Falls Main Office as required. This may include generating correspondence or reports, filing, data entry, etc.
- Serves as a notary public as needed.
- Assists various departments with special projects or administrative duties as needed.
- Displays a commitment to giving members the highest quality service. Promotes member service to all employees.
- Safeguards member confidentiality.
- Performs any other duties as assigned.

Additional Duties and Responsibilities:

- Commits to CCU’s mission, vision, and core values and model of Service Excellence. Lives and displays these values in all aspects of work and personal life.
- Keeps current in field by reading published information and attending authorized seminars and conferences. Occasional out-of-town travel.
- Participates in training sessions and online courses as needed.
- Participates in regularly scheduled departmental meetings and coaching sessions.
- Gets involved in professional and/or community activities to contribute to local community/profession and to be visible in the community.
- Represents the department on committees that may be formed and/or at various CCU events.
- Works on assigned Saturdays throughout the year.
- Other job-related duties may be necessary to carry out the responsibilities of this position.

Performance Expectations:

- Communicates with members in a friendly, professional, manner.
- Gives all members their full attention during each interaction; does not attempt to multi-task with other duties or transactions while helping a member.
- Demonstrates accuracy and thoroughness and promotes this attribute to all employees.
- Performs all duties in compliance with CCU policies and procedures.
- Complies with Bank Secrecy Act requirements; always maintains the integrity of our confidentiality policy.
- Maintains a positive, professional appearance and attitude with members and co-workers.
- Develops and maintains positive working relationships with other employees; promotes teamwork concept.
- Maintains a neat workspace.
- Is punctual and reliable.
- Asks for help when necessary.

Knowledge, Skills, and Abilities:

- Excellent communication, customer service and relationship building skills.
- Strong organizational and multitasking abilities.
- Friendly and professional attitude with a focus on member satisfaction.
- Basic mathematical skills.
- Basic computer skills, including Microsoft Office.
- Ability to operate general office equipment.
- High school diploma or equivalent.
- Related financial institution or administrative experience is preferred but not required.

Work Relationships and Scope: Reports directly to the Assistant Branch Manager. This position works interacts regularly with a range of other CCU employees, members, and non-members. They have frequent access to confidential member information.

Working Conditions: Work is performed largely in a pleasant, shared office environment with minimal chance for personal injury. The noise level can range from moderate to substantial at times. There may be occasions when the work environment is stressful. Work hours will normally be from Monday through Saturday and may change depending on our needs or due to special projects, deadlines, and other concerns. Physical requirements include the ability to sit or stand for extended periods of time. Some walking, bending, stooping, and lifting of light materials is required. Frequent mental and visual concentration required for computer usage. Must be able to operate a multi-line phone system. Other equipment that may be used includes a copy machine, calculator, computer, fax machine, and other office and financial institution equipment.

Acknowledgment: This position description describes the general nature and level of work performed by the individual assigned to this position and should not be interpreted as all inclusive. It does not state or imply these are the only duties and responsibilities assigned to the position. The employee may be required to perform other job-related duties. All requirements are subject to change and to possible modification to reasonably accommodate individuals with a disability.

This position description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the position change.