

Customer Service Center Specialist

Stoughton, MA

Envision Bank believes in people helping people – it was our belief when we first opened our doors in 1851 as Randolph Savings Bank, and it holds true today. For over 150 years, we have been providing individuals, families, homeowners, and businesses in our community a wide variety of products that are convenient and hassle-free.

We're employee owned and customer experience driven. We care and we need people who care as much as we do. We are part of the communities in which we live. Relationships matter. We strive to make things simple and get things done. If this sounds like you, please read on . . .

Position Summary:

Customer Service Center Specialists are motivated individuals with a passion for helping customers and building relationships through the proactive identification of customer needs and the recommendation of Bank products. The CSCS is the face of the bank to the customer and is expected provide a superior customer experience by efficiently responding to service requests, and where appropriate engaging callers in conversations that encourage the creation of new customer relationships or the expansion of services to existing customers. Performs all tasks in compliance with established Bank policies and procedures, with Federal and State laws and with all Fair Lending regulations.

Primary Responsibilities:

Sales

- The CSCS will focus on acquiring, expanding and maintaining relationships by using the organization's established sales process. This will include working with prospective customers who call into inquire about products and services, turning service calls into opportunities to expand relationships and proactively reaching out to customers and prospects through outbound telemarketing when assigned.
- Partners with other business units to provide qualified warm referrals of customers where appropriate.
- The CSCS will focus on relationship building by determining customers' needs then identifying and recommending appropriate bank products and services.
- A strong focus on product & service knowledge is a must. This will allow the CSCS to accurately and efficiently complete customer requests and obtain proper documentation.

Operations

- Adheres to Bank policies and procedures and performs functions in compliance with all rules and regulations. Updates security and regulatory information through regular training.
- Maintains a superior knowledge of bank operational procedures to ensure they are able to provide customers with accurate information without having to transfer to other departments.
- Creates friendly, positive impact on customers and provides effective product and service resolutions to customers.

Compliance

- Performs responsibilities in accordance with all applicable federal and state regulations, including but not limited to the Bank Secrecy Act, OFAC, Equal Credit Opportunity Act, Fair Credit Reporting Act, Electronic Funds Transfer Act, Truth-in-Savings Act and the Truth-in-Lending Act.
- Required to adhere to requirements of the SAFE ACT and Mortgage Loan Originator Rule as outlined in the ENVISION BANK SAFE ACT and Mortgage Loan Originator Rule policy. In addition, each LO will receive annual training on SAFE ACT and Mortgage Loan Originator Rule. The LO is required to follow specific procedures that outline when the MLO NMLS# should be provided, and on which documents the MLO NMLS# should be displayed, such as business cards, emails, correspondence, etc.
- Demonstrates continual learning by attending industry seminars, webinars and other training programs, like Link Live, Business Online Account Create, Integra and Encompass.
- Secures necessary information to complete deposit and loan account applications.

Position Requirements:

- High school diploma or equivalent
- One (1) year Call Center experience strongly preferred
- Prior banking experience helpful
- Demonstrated sales skills
- Strong verbal and written communication skills
- Intermediate-level computer skills, including Microsoft Word and Excel
- Strong organizational skills with the ability to multitask, while maintaining a positive and professional disposition

- Availability to work flexible hours, including early in the morning and into the early evening and weekends

Envision offers a comprehensive benefit package including 401(k) Safe Harbor and Matching contributions and Employee Stock Ownership Plan (ESOP) participation.

At Envision Bank **PRIDE** is the foundation of who we are and what we strive to be. If you possess a **P**assion to win, are **R**elationship-driven, thrive in an environment of **I**nnovation and continuous learning, believe in **D**oing the right thing, and are interested in Engaging with a collaborative team, then we want to get to know YOU better!

Apply today at <https://envisionbank.applicantstack.com/x/apply/a2clvbsda5mx>

Envision Bank takes pride in being an Equal Employment Opportunity employer and seeks to create and maintain a vibrant diverse workforce. Equal Opportunity Employer – minorities/females/veterans /individuals with disabilities/sexual orientation/gender identity are strongly encouraged to apply.