



JOB DESCRIPTION

Title: Member Service Representative II (Experienced)

Salary Level: 2

Time Type: Full-time

Revised: October 2020

Location: Madison Heights, MI and Troy, MI
(on location preferred, but also considering remote candidates)

Department: Membership Services

Job Summary

Handles incoming telephone as well as email inquiries and responds appropriately including promotion of BetterInvesting programs, products, and services. In addition, this position is responsible for accurately dealing with varied and sometimes complex member service issues. Member Service Representatives provide technical support to product users by researching and answering questions and troubleshooting problems. Must demonstrate a strong commitment toward giving quality member service and achieving department/organizational goals.

Should understand, or be ready to learn, the mission, investment principles and philosophy of NAIC / BetterInvesting and how NAIC / BetterInvesting relates to its members and its volunteers. Thoughts/ approach to investing must align with the core principles of the NAIC dba BetterInvesting.

About NAIC / BetterInvesting

As a nonprofit organization, our mission is to educate individual investors and investment clubs to become successful lifelong investors. You can read more about our organization, founded in 1951, at www.betterinvesting.org

Essential Functions

1. Answer incoming calls in a courteous, friendly and professional manner.
2. Seize opportunities to sell memberships/products when they arise.
3. Build sustainable relationships and engage customers by going the extra mile.
4. Place orders and take member mailing/billing information; research and resolve billing issues.
5. Interview members and input into CRM system in an accurate and timely manner.
6. Research and resolve complaints to ensure member retention and satisfaction.
7. Assist members with navigation of our website; as well as helping them install or use company software and web-based tools.
8. Provide answers to customer inquiries by identifying problems, researching answers, and guiding users through corrective steps.
9. Meet or exceed daily, weekly, and monthly call targets.
10. Complete call logs and reports.
11. Recognize, document and alert the supervisor of trends in customer calls.
12. Perform outbound calls in conjunction with department revenue generation and retention initiatives.
13. Perform additional duties as assigned.

Knowledge, Skills, Abilities**Knowledge**

The successful candidate must have proficient knowledge in the following areas:

- basic reading, writing, and arithmetic skills required
- computer literate with the ability to learn customer service software applications
- ability to type 30 wpm
- internet including browser and email applications
- sales, customer service, or call center experience
- Microsoft Word, Excel, and online meeting software

Skills

The successful candidate must demonstrate the following skills:

- Data entry on a keyboard
- Visually able to interpret data from screen or written documents
- Understand and carry out written and verbal instructions
- Communicate clearly and concisely in verbal and written form
- Physically able to maintain continuous hours of sitting at a work station and answering high volume of incoming calls
- Ability to perform mathematical calculations with speed and accuracy (use of calculator acceptable)

Abilities

The successful candidate must have the ability to:

- Educate and explain to members all areas of products, programs, services and procedures.
- Make independent judgments and post transactions
- Make sound decisions regarding members' accounts to benefit both BetterInvesting and the member
- Demonstrate strong communication skills – oral and written – with members (current and prospective), other departments, peers and management
- Get involved in solving unique/complex problems
- Understand the basis for procedures and deals appropriately with departures from the standards
- Meet individual goals as applied to job function



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Qualifications

To perform this job satisfactorily, a successful candidate must be able to perform each essential function satisfactorily. The requirements listed below are representative of the knowledge, skills and abilities identified above.

Level	Education and Experience	Skill	Demonstration of Knowledge Skills and Abilities	Supervision Given and Received
MSR II (Experienced)	High School diploma or equivalent, and 3-5 years customer service experience.	An intermediate level of skill, customer service, and knowledge of BetterInvesting programs, products, and services. Fully competent to handle all aspects of job.	<ul style="list-style-type: none"> Duties and tasks are frequently non-routine. Performs a variety of tasks, under general supervision Processes orders, prepares correspondence, and fulfills customer needs to ensure customer satisfaction. Familiar with standard concepts, practices, and procedures in the field. Relies on a depth of experience and judgment to plan and accomplish goals. A certain degree of creativity and latitude is required. 	Resolves most questions and problems, referring the more complex issues to appropriate staff.

We welcome all applicants including stay-at-home parents, retirees, those returning to the work force after an extended period away, etc.

We are an equal opportunity/affirmative action employer, complies with all applicable federal and state laws regarding nondiscrimination and affirmative action. We are committed to a policy of equal opportunity for all persons and do not discriminate on the basis of race, color, national origin, age, marital status, sex, sexual orientation, disability, religion, height, weight, or veteran status.

To apply, email us at careers@betterinvesting.org

This job description does not list all the duties of the job. Management sometimes assigns additional duties. This job description may be revised at any time. The job description is not a contract for employment, and either the employee or the employer may terminate employment at any time, for any reason.