



## POSITION DESCRIPTION

**TITLE:** Customer Experience Operations Analyst

**CATEGORY:** Full-Time

**FLSA:** Exempt

**LOCATION:** Nixa, MO or Shawnee, KS

**DEPARTMENT:** Customer Experience

**REPORTS TO:** Customer Experience Operations Manager

**SHIFT:** Monday-Friday: 8:00 a.m.-5:00 p.m.

**DATE:** June 9, 2025

### SUMMARY

The Customer Experience Operations Analyst plays a key role in supporting the daily operations of the bank's customer service call center. This position ensures efficient and effective customer interactions, manages workflows, and implements best practices for service quality. This position will work closely with the Customer Experience Operations Manager to improve processes, troubleshoot operational issues, and enhance the overall customer experience.

### ESSENTIAL DUTIES

- Assist in monitoring the daily call center operations to ensure efficiency and adherence to service level standards.
- Track key performance indicators (KPIs), such as call volume, response times, and customer satisfaction, and assist in reporting these metrics to management.
- Identify and resolve operational challenges, ensuring minimal disruption to service levels and customer satisfaction.
- Collaborate with management to identify opportunities for process improvements and implement operational changes to enhance efficiency and service delivery.
- Assist with creating and updating call center procedures, scripts, and guidelines to ensure consistency and accuracy in service delivery.
- Conduct regular quality assurance reviews of customer interactions to ensure representatives are following protocols and providing accurate, timely, and friendly service.
- Assist in the development and delivery of training materials to improve call center representatives' skills and product knowledge.
- Collaborate with other departments (such as banking operations or IT) to resolve customer issues quickly and accurately.
- Monitor the performance and functionality of call center systems and tools.



- Troubleshoot system issues as they arise and collaborate with IT teams to ensure minimal downtime or disruptions.
- Assist with the preparation of reports on call center performance, customer satisfaction, and operational efficiency.
- Support efforts to ensure that the call center operates within the framework of the bank's risk management guidelines, and ensure the call center adheres to all regulatory requirements, company policies, and industry best practices.

## SECONDARY DUTIES

The Customer Experience Operations Analyst performs duties specific to the position and other functions as assigned.

## RESPONSIBILITIES

- Ensure compliance with all bank policies and procedures, as well as all applicable state and federal banking regulations.
- Treat people with respect, keep commitments, inspire the trust of others, work ethically and with integrity, uphold the bank's values, and accept responsibility for one's own actions.
- Demonstrate knowledge of and adherence to EEO policy, show respect and sensitivity for cultural differences, educate others on the value of diversity, promote a working environment free of harassment of any type, and value a diverse workforce.
- Follow policies and procedures, complete tasks accurately and on time, support the bank's goals and values, and benefit the bank through outside activities.
- Perform the position safely, without endangering the health or safety of yourself or others, and report potentially unsafe conditions to management. Comply with occupational safety and health standards and all rules, regulations, and orders issued pursuant to the OSHA Act of 1970 that are applicable to one's position at the bank.
- Possess and maintain a current driver's license and a vehicle with appropriate insurance coverage. Both are required to drive while performing assigned duties and responsibilities.
- Possess and maintain adequate skills in computer operation, including email, word processing, spreadsheet, and specialty software programs.
- Possess and maintain adequate typing skills to meet the needs of the position.
- Possess and maintain adequate math skills to meet the needs of the position. This may include the ability to count currency and coin, calculate interest, balance accounts, add, subtract, multiply, and locate routine mathematical errors.
- Practice effective and efficient organizational and time management skills.
- Be able to work with general supervision while performing duties.
- Use effective verbal, written, and interpersonal communication skills. This includes the ability to apply common sense when carrying out instructions, interpreting documents, understanding procedures, writing reports and correspondence, and speaking clearly to customers and employees.
- Be able to deal with routine problems involving multiple facets and variables in standardized situations.

## SUPERVISOR RESPONSIBILITY

The Customer Experience Operations Analyst is not responsible for the supervision of any employee(s).

## ENVIRONMENT, PHYSICAL & MENTAL DEMANDS

The environment for this position is primarily a non-confined office-type setting in which employees are free to move about at will. This environment may include some minor annoyances, such as noise, odors, drafts, temperatures, etc.

Physical demands include writing, typing, speaking, listening, lifting (up to 25 pounds), driving, carrying, seeing (such as close, color and peripheral vision, depth perception, and adjusted focus), sitting, walking, standing, squatting, kneeling, and reaching.

Mental demands include analytical reasoning, reading and understanding documents or instruments, performing detailed work, following directions, problem solving, providing effective customer or employee communication, performing accurate math calculations, understanding language, engaging in effective verbal and written communication, enduring stress, conducting multiple concurrent tasks, and withstanding constant interruptions.

Physical and mental demands also include correct usage of the following equipment: telephones, cellular phones, copy and fax machines, adding machines or calculators, encoders, money counters, credit card terminals, postage machines, cash recyclers, vaults, computers, and related printers.

Work environment characteristics, physical demands, and mental demands are representative of those an employee encounters while performing the essential functions of this job and represent the knowledge, skill, and/or ability required to perform the job in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the job.

## QUALIFICATIONS

These qualifications are general guidelines normally considered essential to the satisfactory performance of this position. The specifications listed below are representative of the knowledge, skill, and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviations from these qualifications.

- Bachelor's degree in Business, Communications, IT or a related field preferred.
- Minimum of 2-3 years of experience in call center operations, preferably in the banking or financial services industry.
- Strong understanding of call center metrics, operational workflows, and customer service best practices.
- Excellent problem-solving and critical thinking skills.
- Proficient in call center software, CRM systems, and Microsoft Office applications.
- Exceptional organizational and multitasking abilities, with a strong attention to detail.

- Strong communication and interpersonal skills to effectively interact with team members, management, and customers.
- Ability to handle sensitive customer information with discretion and confidentiality.
- Ability to work in a fast-paced environment and adapt to changing priorities.

**Management reserves the right to change this position description at any time according to business needs.**

