

JOB DESCRIPTION

Job Title: Member Experience Representative

Dept./ Division: Branch, Retail Services

Reporting to: Branch Manager

GENERAL ACCOUNTABILITY

The Member Experience Representative is responsible for providing the optimal member experience through exceptional member service and identifying and providing solutions for members' financial needs. The Member Experience Representative will provide relevant, timely and accurate financial advice to members and prospective members to meet their financial goals, and to become the financial institution of choice. The Member Experience Representative must be a team player and willing to go above and beyond to provide the optimal member experience. The Member Experience Representative will assist with achieving the goals and objectives relating to business development as set forth by the Branch Manager at multiple branches.

Primary Duties and Responsibilities

Sales:

- Uncover and identify opportunities with members and prospective members
- Responsible for proactive business development activities and fulfilment both internally and outside the branch.
- Provide products and services to members to increase share of wallet and ensure we are the primary financial institution of choice.
- Utilize the sales cycle to optimize value for members and fully capture all sales & service opportunities including follow up by using our CRM. Provide relevant and qualified referrals based on business plan and assigned goals (i.e. Wealth Management, Commercial, Investments).
- Accountable for achieving goals for a portfolio of members as set out by the Branch Manager

Service:

- Must adhere to FirstOntario Credit Union's Member Experience standards with all of our external and internal members along with external partners.
- Must promote all alternative delivery channels to the Member including but not limited to online banking, PAT, mobile banking etc.
- Operate and make decisions within prescribed delegated authorities including but not limited to guidelines outline in your "letter of authority"
- Provide prompt, accurate efficient transactional service to members, including deposits, withdrawals, cheque cashing, member cards and pinning, cheque ordering and general statement inquiries
- Required to backup traditional MSR, Admin, & MC roles
- Assist / relieve other positions or with duties in the home branch or other branches within region as required.

Operations:

- Complete branch opening and closing activities, as required or assigned.
- Perform all audits, processes and proofing as required
- Balance cash daily or as instructed

- Provide credit and non-credit administration support to Management and other staff as required (reporting, member correspondence, etc.)
- Assist in maintaining combinations and safety deposit box records and controls
- Perform custodian functions according to policy and procedures with respect to cash custody, safeguarding and securities. This includes cash orders and shipments, teller crosses, and managing branch cash holding

Organizational Competencies

Sales & Service Orientation

Committed to serving and satisfying the needs of the external and internal members/clients through the delivery of superior value while building, strengthening and maintaining long-term relationships.

Continuous Learning

Demonstrates the desire to continually grow, learn and develop skills and knowledge through external and internal education, training and cross-training opportunities to maximize personal contribution to the organizational goals and ongoing career development.

Organizational Effectiveness

Ability to understand the organization's strategic direction, how decisions impact the business, and how to strive to improve organizational performance.

Ethical Behaviour

Ability to demonstrate integrity, credibility, confidentiality and responsibility in all member/client interactions.

Communication

Demonstrates the ability to receive and understand information, and respond verbally or in writing when interacting with others

Functional Excellence

Demonstrates the knowledge and technical expertise of products and processes and their use in delivering quality member/client services

Job Specifications and Technical Requirements

- Grade 12 or equivalent
- Must have the demonstrated efficiency, technical knowledge, and ability to perform the job (ie: MC learning Path)
- 4 years office, credit union/ bank experience or demonstrated experience
- Must complete other job-related courses and certificates as required
- Competent knowledge of Microsoft Office Suite
- A knowledge of the Financial Services Industry as well as active correspondence of competitors benchmarks and standards
- Must have demonstrated interpersonal and communication skills.
- Must be able to work well with a minimum of supervision
- Must be capable of working as a team player, willing to assist other staff as required
- Must have a positive attitude and will go above and beyond
- Position expectation meeting will be required prior to awarding the position