

JOB DESCRIPTION

Job Title: P.A.T. (Personal Assisted Teller)

Dept./ Division: Sales

Reporting to: Manager, PAT and Central Operations Support

GENERAL ACCOUNTABILITY

Reporting to the Manager, and Central Operations Support, the P.A.T. will provide prompt, efficient and courteous transactional sales and service to members. Working with Branch Management and staff as well as other departments and divisions within FirstOntario Credit Union, you will ensure and promote established contacts with members and prospective members. Proactively assists members to ensure that their needs have been met and refer to other staff (team), as appropriate.

Primary Duties and Responsibilities

Sales:

- 1) Provide courteous, prompt, accurate, efficient sales and services to members via virtual channels.
- 2) Recognize and act upon appropriate opportunities to engage members in discussions to enhance their share of wallet through cross sells, referrals, or consolidation of business held with competitors.
- 3) Achieve sales targets as outlined within yearly business plans.
- 4) Utilize referral standards to achieve targets.
- 5) Track all sales activities as per pre described corporate standards (referrals, sales, pipeline).
- 6) Actively contribute to campaign sales activities, as directed.
- 7) Build positive relationships with internal partners to support each other's business goals.

Service:

- 1) Apply FirstOntario Credit Union's sales and service standards with all of our current and prospective members.
- 2) Enhance the member experience by providing exceptional, professional and consistent client service using PTM technology, which includes but is not limited to: performing accurate transactions, greeting the member, smiling, using the member's name during the transaction and thanking each member for his or her business. Provide consistent positive memorable member experiences

- 3) Work with member to resolve inquiries and/or concerns. Assist other members of the team if “wait time” for other members may be compromised.
- 4) Place a member’s, or perspective member’s needs, for service and attention before any administrative or operational work of your own.
- 5) Keep member contact diary system up to date with relevant follow up action.
- 6) Maintain ongoing activity plan to assist prioritizing sales, service and operational work.
- 7) Track activity and results for retention, consolidation, acquisition, as required.
- 8) Actively participate in sales meetings, as required.

Operations

- 1) Perform administrative duties and special projects as assigned.
- 2) Adhere to policies, procedures and standards.
- 3) Complete all work accurately and efficiently.
- 4) Perform all audits, processes and proofing, as required.
- 5) Maintain a clean and safe workstation at all times.
- 6) Responsible for all existing virtual programs, subsequent and evolving virtual channels
- 7) Complete sundry as well as other duties required by the Virtual Retail Services Manager

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

People Management

Building partnerships with co-workers within a team oriented environment, working with minimal supervision and willing to learn and apply coaching in the quest to achieve organizational goals

Job Specifications and Technical Requirements

- Grade 12 or equivalent.
- 4 years credit union experience
- Be comfortable, professional and friendly on camera.
- Excellent communication skills.
- Ability to assess risk and make sound decisions or exceptions credit union or bank experience.
- On-line exposure
- Ability to type 30 wpm
- Must have a demonstrated sales ability, able to identify member needs, promote our products and have a proven record of success in closing the sale.
- Must be flexible and prepared to work hours established to meet member service demands.
- Strong PC skills and experience with office equipment such as 10-key calculator, PC keyboard, copy and fax machines. Familiarity with Lotus Notes and Microsoft Office Suite a plus.
- Ability to multi-task by operating multi-monitors and software systems at the same time