

**Business Development Officer (PA)**

<b>Employee:</b>		<b>Department:</b>	Marketing
<b>Reports To:</b>	VP of Marketing & Business Development	<b>FLSA Status:</b>	Exempt
		<b>Updated:</b>	November 2018

**SUMMARY:** The Business Development Officer has regional responsibility in the Philadelphia, PA area to expand the awareness of Sun Federal’s Credit Union’s mission, vision, and values. Understands applicability of all products and services and recommends most suitable option including business services within the communities we serve through personal outreach. Cultivates relationships with key strategic constituencies (i.e. Sponsor Groups, Business Members, Advocates, affiliations, associations) and the community. Recommends short and long range sponsorships and charitable contributions/support. Is a representative at key events and seeks opportunities to serve on various boards, committees and other volunteer opportunities aligned with Sun Federal’s mission

**ESSENTIAL DUTIES & RESPONSIBILITIES**

*Employee must effectively carry out the following essential duties and responsibilities of this position in a manner that consistently demonstrates Sun Federal’s mission, values and culture. Other duties may be assigned.*

**1) Assumes responsibility for the development and engagement of Sponsor Group relationships.**

- a. In support of Business Plan goals and objectives performs consultative and developmental sales activities, including but not limited to: conducting meetings with prospective business/community partners, consulting with prospective partners on employee financial service needs, and developing offers packaged as a benefit and providing solutions to client requests.
- b. Advocate, organize and execute networking activities within Sponsor Groups for new member acquisition and deepening current relationships and product engagement.
- c. Available for grand openings, events, orientation programs, benefit fairs, etc. as they are available to increase penetration of new business among these groups.
- d. Strives to maximize ROI for regional business development activities and relationships.
- e. Provides business development guidance and partnership to Branch Management.
- f. Sells and opens member accounts. Analyzes member needs and recommends appropriate products and services to deepen relationship.
- g. Maintains a complete database of relationships and viable prospects within assigned goals.
- h. Works with and supports the VP of Marketing & Business Development to identify and craft target messages, meaningful activities and evaluation of outcomes. Increases Sun Federal’s image and visibility with all public, community organizations and constituents.
- i. Coordinates and conducts Financial Education sessions, speaker events, seminar promotions, community events and publicity.
- j. Promotes Volunteer Advocates by developing relationships within sponsor groups. Identifies potential candidates for Sun Federal Advisory Board.

**2) Assumes responsibility for Developing and Deepening Member Business Services Relationships.**

- a. Sells and opens member business accounts. Analyzes business member needs and recommends appropriate products and services to deepen relationship.
- b. Educates business owners on sponsor group employee benefit.
- c. Makes regular visits to targeted and new business services members. Conducts follow-up calls to build relationships and engagement, solve problems and prospect for future business.
- d. Assists member business owner or representative with completing documents required to establish account and commercial loan utilizing all related software and systems.
- e. Works with the Director of Business Services and generates or follows up on business leads.

**3) Assumes responsibility for team contributions and effective communication.**

- a. Participates in the departmental budget process and department strategy sessions. Manages expenses accordingly.
- b. Collaborates, contributes, and communicates for the success of the team. Invites and accepts feedback from others and provides upward feedback.
- c. Keeps the Vice President of Marketing & Business Development informed of major initiatives, planned activities and any significant concerns.

**4) Assumes responsibility for establishing and maintaining effective relationships with members, member business owners, SEG/Sponsor Groups, community, and trade organizations.**

- a. Ensures that member needs, requests and inquiries are promptly and courteously addressed.
- b. Ensures that all members are informed of Credit Union purpose, products and services.
- c. Maintains productive relationships with Credit Union associations and community to further the overall objectives and policies of the Credit Union.

**5) Assumes responsibility for related duties as required or assigned.**

- a. Completes special projects as assigned.

**Performance Measurements**

1. Excellent relationships exist with members, sponsor groups, businesses and community.
2. Establishes “Advocate” at sponsor groups served.
3. Is viewed as a resource partner for SG employee financial services and education.
4. Goals focused on maximizing SG relationship opportunities are met.
5. Prospects for new SG’s that fit Sun Federal’s business model and achieves associated goals.
6. Achieves assigned Business Development/Services goals (new accounts & depth of relationship).
7. The Vice President of Marketing & Business Development is appropriately and proactively informed of activities and of significant problems. Recommendations for improvement and effectiveness are also provided.

**Expectations for Employees**

- 1) Supports Sun Federal’s mission, vision, values and culture. Makes a positive contribution to business plan objectives and goals. Follows Sun Federal’s Service Behaviors. Shows professionalism, empathy and respect in all interactions with members, internal and external.
- 2) Takes personal responsibility to actively listen to the members, understand their needs and take initiative to help the member as your first priority.

- 3) Take ownership of job duties. Offer team members assistance when necessary to help develop a fully competent and cohesive workforce. Recommends and develops process improvements and procedures to enhance productivity and improve service.
- 4) Responsible for personal development through training, collaboration and teamwork. Understands and adheres to all policies, procedures and regulations. Maintains knowledge of regulations appropriate for position (i.e. Bank Secrecy Act, OFAC, CFPB including regulations Z (Truth-in-Lending), C (HMDA), etc.) and attends all training as it relates to position related regulations.
- 5) Adheres to Sun Federal’s security procedures and safeguards member information.
- 6) Demonstrates professionalism in dress, tone, flexibility and communication.
- 7) Consistently acts as part of a cohesive team, demonstrating excellent interpersonal skills and the ability to interact positively with other employees. Maintains open and respectful communication with other departments. Handles conflict directly and discreetly.

*To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of knowledge, skill and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. The individual must be able to successfully pass background checks.*

## **QUALIFICATIONS**

<b>EDUCATION/CERTIFICATION:</b>	Bachelor degree in Marketing or related field or equivalent work experience.
<b>REQUIRED KNOWLEDGE:</b>	Thorough knowledge of all Sun Federal products and services. Thorough knowledge of account opening policies and procedures Thorough knowledge of Credit Union Business Services, Wealth Management, loan products, underwriting standards and applicable policies and procedures.
<b>EXPERIENCE REQUIRED:</b>	3 – 5 years of Business Development, Sales Management and/or Marketing experience.
<b>SKILLS/ABILITIES:</b>	Strong written and verbal communication skills as demonstrated by the ability to write clear, concise memos, emails, letters and give presentations to large and small groups. Strong organizational and interpersonal skills. Ability to gather, analyze data and provide sound recommendations.

## **PHYSICAL ACTIVITIES AND REQUIREMENTS**

<b>TALKING:</b>	Especially where one must frequently convey visionary and/or detailed or important information accurately.
<b>AVERAGE HEARING:</b>	Able to hear average or normal conversations and receive ordinary information.
<b>REPETITIVE MOTION:</b>	Movements frequently and regularly required using the wrists, hands, and/or fingers.
<b>AVERAGE VISUAL ABILITIES:</b>	Average, ordinary visual acuity necessary to prepare or inspect documents or products, or operate machinery.

**PHYSICAL STRENGTH:** Occasional sitting, but requires the ability to walk and stand to make presentations and visit members/potential members.

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**WORKING CONDITIONS** Frequent local travel and occasional out of town travel required. No hazardous or significantly unpleasant conditions (such as in a typical office).

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## **MENTAL ACTIVITIES AND REQUIREMENTS**

**REASONING ABILITY:** Ability to deal with a variety of variables under only limited standardization.

Able to interpret various instructions.

**MATHEMATICS ABILITY:** Ability to perform very basic math skills including adding, subtracting, multiplying, and dividing two digit numbers; to perform the four basic arithmetic operations with money; to perform operations with units such as inch, foot, and yard; ounce and pound (or their metric counterparts).

Ability to read a variety of books, magazines, instruction manuals, atlases, and encyclopedias.

Ability to prepare memos, reports, and essays using proper punctuation, spelling and grammar.

Ability to communicate distinctly with appropriate pauses and emphasis; correct pronunciation (or sign equivalent) and variation in word order; using present, perfect, and future tenses.

## **JOB DESCRIPTION INTENT & PURPOSE**

*Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.*

*All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all inclusive. Additional functions and requirements may be assigned by managers as deemed appropriate.*

*In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.*

*Job descriptions are not intended as and do not create employment contracts. Sun Federal maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.*

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Employee Signature

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Date

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Business Development Officer (Reading & Radnor, PA) - Job Description