

## Member Service Representative

<b>Employee:</b>		<b>Department:</b>	Sales & Branch Operations
<b>Reports To:</b>	Branch Manager	<b>FLSA Status:</b>	Non-Exempt
		<b>Updated:</b>	March 2015

**SUMMARY:** Opens accounts and conduct financial transactions between member-owners and the Credit Union, handle routine member inquiries and problems and maintain favorable member and employee relations. The Member Service Representative works to improve the quality of life for each member by providing a personal and professional service relationship which results in a lifetime relationship. Demonstrates the “People Caring about People” mission of Sun Federal Credit Union in each member interaction. Goals for this position are excellent member relations, prompt friendly service, member education, transaction quality, transaction efficiency and teamwork.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** *Must effectively carry out the essential duties and responsibilities of this position in a manner that consistently demonstrates Sun Federal’s mission and core values in a positive manner. Other duties may be assigned.*

### 1) Actively participate to achieve scorecard results

- a) Meet specific goals for member service, sales and accuracy.
- b) Educate members about convenience service options such as online banking, mobile banking and shared branching.
- c) Responsible for the accuracy of all transactions.
- d) Ensure that all member requests are processed accurately and efficiently.
- e) Responsible for researching all teller transactions when potential errors are identified and responsible for communicating with affected members.

### 2) Develop and Maintain Quality Member Relationships

- a) Provide personalized, professional service to all members in an exceptional manner, seeking out opportunities to exceed member expectations.
- b) Meet expected service levels for wait time and accuracy.
- c) Consistently demonstrate all expected service and sales behaviors.
- d) Ensure that all member requests are processed accurately and efficiently.
- e) Maintain a high degree of knowledge in all credit union programs, ensuring quality service and accuracy is delivered to Sun Federal members.
- f) Always act in the member’s best interest; consistently educate members about their financial choices including convenience service options.
- g) Consistently recognize opportunities to refer members to lenders and other business partners.
- h) Participate in the development and attainment of branch goals.
- i) Take responsibility for retaining member relationships.
- j) Take ownership of problems, show empathy and apologize for errors and follow up appropriately. Utilize member feedback to enhance service quality, create equitable solutions and increase member loyalty.

- k) Display sound judgment in handling member requests and exceptions, seeking and documenting approval as needed.
- l) Consistently meets service behavior standards.

### **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. While some have little direct member contact, every position at Sun Federal supports the member.
- 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, 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.

### **Qualification Requirements**

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.

- 1) High school diploma or equivalent.
- 2) Excellent analytical skills.
- 3) Demonstrated ability to work under and meet deadlines.
- 4) Demonstrated ability to work with multiple priorities.
- 5) Demonstrated ability to solve problems independently.
- 6) Demonstrated ability to process paperwork accurately and efficiently.
- 7) Must be fluent in English with strong written and verbal communication skills.
- 8) Demonstrated ability to provide remarkable member service.
- 9) Ability to add, subtract, multiply and divide.
- 10) Ability to work in a typical office environment and operate general office equipment including a personal computer. Literacy required in software programs such as Microsoft Windows, Word, Excel, Outlook and other third party process solutions such as LoansPQ and Branch Suite.
- 11) Must complete annual compliance requirements.

12) Ability to lift up to 50 lbs.