

Open Position: Member Services Representative
Reports To: AVP Branch Manager
Location: Dundee Branch



FLSA: Non-Exempt

SUMMARY:

Interacts directly with credit union members and employees. Provides quality member service in person and by telephone; processes member requests accurately and timely; provides service and rate information; processes transaction requests, answers questions regarding account information. Performs duties in accordance with established policies and procedures. Resolve basic service issues or refers to appropriate co-worker to guarantee member satisfaction and retention. Promote services and products, via member education and cross-sell referrals. Follows fraud prevention and security procedures. Assist other co-workers as needed.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following: Other duties may be assigned.

- Maintains a functional level of knowledge and procedural expertise in all Credit Union products and services. Interacts with employees and members, provides staff members a positive and professional role model of member service and sales through personal example.
- Ensures accurate processing of transactions for members including but not limited to: receiving and/or disbursing of funds, deposits, withdrawals, transfers, cashing of checks, loan payments, traveler check purchases, money orders, amusement park tickets, transfers, Visa payments and cash advances, and other transactions as necessary.
- Provide information to members as requested including: deposit and loan rates, balances, check clearings, deposit postings, verification of funds, and other service information.
- Identifies members' and potential members' needs and sells and cross-sells Credit Union services and products actively in an appropriate, professional manner. Explains specific services, products, and policies, including membership eligibility requirements
- Assist members with problems and complaints providing resolution when possible, directing them to his/her Supervisor or to the proper department for further assistance.
- Opens and closes building and vault as scheduled using proper security measures.
- Other duties including but not limited to: ordering supplies, completion and auditing of Currency Transaction Reports, monthly audit of cash drawer and assists with Federal Reserve currency shipment/receipt.
- Ensures security procedures, policies and measures are followed including: establishment and recording of bait money, the cash drawer is never left unattended, familiarity with security equipment, dual verification of cash drawer, maintains secrecy of password and vault combination, and signs off computer when leaving work station.
- Treats all member transactions and information (positive or negative) completely confidential. Discloses information only as required by member and TLC policies.

- Maintains a high priority on being available to members/co-workers by being at work station as assigned and during business hours.
- All other items assigned and deemed necessary by Management.

SUPERVISORY RESPONSIBILITIES:

None

PERFORMANCE STANDARDS:

- Ensures exceptional member service.
- Accurately and efficiently process transactions.
- Cross-sell products and services.
- Adhere to Credit Union policies and procedures

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 the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE:

- Requires High School Diploma.
- Requires one to three years previous experience in financial institution environment.
- Requires strong interpersonal and verbal communication skills.
- Requires strong written communication skills.
- Requires the ability to type accurately and operate a data entry terminal.
- Requires basic knowledge of Microsoft Word and Excel.

COMMUNICATION SKILLS:

- Ability to write routine correspondence.
- Ability to read and interpret documents.
- Ability to speak professionally and effectively with members, potential members and other employees of organization.

CERTIFICATES, LICENSES, REGISTRATIONS:

No requirement.

OTHER SKILLS and ABILITIES:

- Self motivated to insure current and accurate product knowledge for all personal and business products and services.
- Frequent need to be resourceful and persuasive using a high degree of concentration, patience, and initiative.
- Flexible with an ability to work in a team environment assisting other co-workers as required.
- Ability to take on additional tasks and duties as assigned.
- Ability to operate general office machines and equipment such as: typewriter, photocopier, fax machine, computers, and telephones.

WORKING CONDITIONS:

Branch-based. Work conditions include standing, lifting, bending, stooping, and reaching. Some positions are rotating which requires frequent travel to various branches.