



Position Title		Division
Assistant Vice President, Business Relationship Manager		Lending
Reports To:	Department	Date
Vice President Business Development	Business Development	September 16, 2021
Supervises	FLSA	Revised
N/A	Exempt	September, 2021

GENERAL SUMMARY

Responsible for cultivating new business and member relationships through active management of a portfolio and working closely with our retail branch partners. Plays a key role in building relationships with members to deliver an exceptional experience

MAJOR RESPONSIBILITIES *(in descending order of importance and should be no more than 10, if possible)*

1. Generates new business in an assigned territory and manage relationships with expectations on exceeding assigned sales and service goals.
2. Delivers Credit Union products and services with primary focus on deposit gathering including lending, cash management, investments, merchant services and payroll.
3. Sources, structures and presents business lending opportunities.
4. Executes targeted COI (center of influence) plan to build relationships and increase brand recognition in the marketplace in an effort to achieve goals.
5. Acts as the primary partner with our Retail teams, including joint calling, coaching and supporting designated branch assignment.
6. Introduces members to appropriate lines of business or support specialists to deepen share of wallet.
7. Practices sound risk management protocols and adheres to internal and regulatory requirements.
8. Stays abreast of marketplace trends to ensure that loan products are competitive with other financial institutions or financial services companies. Designs and recommends changes to loan offerings, oversees implementation of new loan products. Advises marketing staff on advertising or promotional strategies to build loan balances.
9. Performs other duties as assigned by the Vice President Business Development or other members of senior management.

QUALIFICATIONS:

Education

Associates Degree or equivalent combination of education and experience.

Experience/Skills/Knowledge:

1. 5+ years of experience in a Business Banking sales role or related business development experience.

2. Knowledge of marketplace and ability to develop, retain and expand relationships with Centers of Influence (i.e., CPA's and Attorneys.)
3. Understanding of core business products and services.
4. Understanding of business lending including SBA guidelines.
5. Proven track record of sales and outside calling skills.
6. Ability to handle multiple projects/priorities simultaneously with an effective outcome.
7. Ability to develop strong member and colleague relationships to deliver an exceptional experience in alignment with the credit union's vision and core values.
8. Ability to deal with highly confidential information. Must possess strong service orientation skills.
9. Excellent verbal, written, telephone and interpersonal communication skills.
10. PC proficient, including Microsoft Office (Word, Excel, PowerPoint, Outlook) and the Internet.
11. Ability to function in a commercial office environment and utilize standard office equipment including but not limited to: fax, copier, telephone, etc. Some travel required. Ability to lift a minimum of 25lbs. e.g. file boxes

GENERAL DESCRIPTION:

In terms of physical requirements, this position requires work best described as:

☐ Sedentary ☒ Light ☐ Medium ☐ Heavy ☐ Very Heavy

PHYSICAL TASKS:

- Standing/Walking/Bending/Stooping – Continuous
- Hearing - Ability to receive information through oral communication (face to face and telephone). - Continuous
- Talking - Expressing or exchanging ideas by means of the spoken word (face to face and telephone). – Continuous
- Reading – Ability to receive information through fax, e-mail and text messages – Continuous

AUDIO / VISUAL:

- Requires vision to perform work dealing with data and figures and computer screens. - Continuous
- Requires ability to prepare and execute presentations, training programs and seminars. - Continuous

PSYCHOLOGICAL/MENTAL DEMANDS:

- Responds positively and productively to stressful (internal and external) member situations - Continuous
- Assists others to work harmoniously and effectively as part of a work team. – Continuous

Employee's Signature		Date	
Manager's Signature		Date	
Human Resources' Signature		Date	