



Position Title		Division
Member Service Advisor		Retail Banking
Reports To:	Department	Date
Contact Center Manager	Contact Center	December 1, 2010
Supervises	FLSA	Revised
N/A	Nonexempt (hourly)	March 29, 2022

GENERAL SUMMARY

Under general supervision, but following established policies and procedures, performs a broad-range of member service/teller activities. Delivers exceptional customer service, aligned with the Credit Union's core values and mission statement. Serves as an advocate for members and is an integral contributor to the credit union's member experience. Meets all established sales and service goals. Provides member services such as transfer funds, wire transfers, checks orders, online banking and debit card troubleshooting, etc. Cross-sells Credit Union products and services. Responds to questions and/or provides information upon request from members (internal and external). Assists members and potential members in understanding and utilizing Credit Union products and service.

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

1. Processes all member transactions via phone, mail, e-mail, fax and online services to include loan payments, account transfers, address changes, online banking and debit cards. Responds to member inquiries regarding discrepancies or problems with their account. Researches and determines correct action in accordance with established policies and procedures. Responds to member's questions, transactions and complaints. Routes calls to proper department only after exhausting all efforts to assist the member
2. Gives prompt, efficient and accurate service in the processing of all transactions such as direct deposits, Debit/ATM cards, CD/IRA/Money Markets. Utilizes tact and process knowledge to research and resolve member inquiries while explaining specific policies and procedures. May place stop payment on checks, provide copies of checks and/or orders checks. Provides accurate information to members regarding Credit Union services, products, policies and procedures. Refers members to departments/personnel providing specialized services as necessary
3. Analyzes member relationship in order to optimize existing products and services and deepen relationships by cross selling of relevant products and services
4. Conducts prospecting including outbound calls and emails as needed and to meet established sales goals.
5. Perform other member services and administrative duties as assigned by the Assistant Manager or Manager.

QUALIFICATIONS:

Education

High school diploma or equivalent (GED) education required.

Experience/Skills/Knowledge:

1. Minimum two (2) years experience in member service, operations and/or lending. Previous customer service experience preferred
2. Demonstrated knowledge of Credit Union products, services, policies and procedures and ability to sell them. Previous telephone sales experience
3. Excellent verbal, written, telephone and interpersonal communication skills
4. Excellent organizational, analytical and problem-solving skills
5. PC proficient, including Microsoft Office (Word, Excel, PowerPoint, Outlook) and the Internet
6. Must possess a strong service orientation
7. Ability to handle multiple projects/priorities simultaneously with an effective outcome
8. Ability to deal with highly confidential information
9. Ability to function in a financial institution branch/office environment and utilize standard office equipment including but not limited to: PC, fax, copier, telephone, etc. Ability to lift a minimum of 25 lbs. (e.g. file boxes) Some travel required

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 – Occasional
- Sitting- 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 and e-mail. - 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.- None.

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	_____