



# Member Experience Professional

Position Information

---

Code/ID: Not Entered

Grade:

Department: Operations

6

Job Classification: Non-exempt

EEOC Category: Administrative Support Workers

Asset Size: 2022 \$200M-\$400M

## Role

Responsible for generating business and deepening relationships by selling products and services to potential and existing members that help them achieve their goals and realize their dreams. Responsibilities include achieving sales goals, receiving and processing member financial transactions and providing high quality member service that makes members feel cared for and appreciated.

## Major Duties and Responsibilities

WEIGHT	DESCRIPTION	ESSENTIAL
40%	Recognizing and referring cross-sell opportunities. Selling financial products and opening deposit accounts. Processing consumer loan requests from application to disbursement.	✓
30%	Responding to member inquiries and concerns and creating positive solutions.	✓
25%	Receives and processes member financial transactions including deposits, withdrawals and loan payments; transfers amounts from member accounts as directed. Answers incoming phone calls and assists members or directs them to the appropriate area for assistance.	✓
5%	Performing daily/weekly sales reporting.	✓
—	Use every member contact as an opportunity to advise member about additional services or programs that might benefit them.	✓
—	Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.	✓

## Knowledge and Skills

### EXPERIENCE

Six months to two years of similar or related experience, including time spent in preparatory positions.

### EDUCATION/CERTIFICATIONS/LICENSES

High school diploma required.

### INTERPERSONAL SKILLS

Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving and

obtaining information, as well as advising or referring, which commonly require shorter discussions.

## **ADA Requirements**

### **PHYSICAL REQUIREMENTS**

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing/descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance. Must be flexible to work at any credit union location.

### **WORKING CONDITIONS**

Must be able to routinely perform work indoors in climate-controlled shared work environment with moderate noise.

### **MENTAL AND/OR EMOTIONAL REQUIREMENTS**

Must be able to perform job functions independently and with limited supervision. Must work effectively as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be able to perform basic financial calculations with accuracy. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under stress of deadline, requirements for extreme accuracy and quality and/or fast pace. Must be capable of exercising highest level of discretion on confidential matters.