



## POSITION DESCRIPTION

**TITLE:** *Member Services Representative*

**DEPT:** Operations

**EMPLOYEE:**

**REPORTS TO:** *Operations Manager*

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### **ROLE:**

Communicate effectively with prospective and existing members in a positive and professional manner. Provide product and service information to prospective and existing members. Assist members by providing information and answering questions about the credit union, services, and the requirements for eligibility. Provide assistance and support to other members of the service team in order to maintain the credit union's service initiative. Assist with community outreach programs and perform other duties as required for the efficient operation of the department.

### **JOB DUTIES AND RESPONSIBILITIES:**

- Open new accounts and cross-sell additional credit union products and services by assessing the needs of the members and offering solutions as necessary (including IRA's & CD's).
- Perform account & member maintenance as necessary.
- Responsible for delivering a high level of member service to internal and external members in accordance with the credit union's service initiative.
- Maintain a working knowledge of the services and products the credit union offers.
- Assists in meeting and exceeding individual, team, and credit union goals.
- Referring existing and new members to a service partner who has specific expertise.
- Initiate follow-up mechanisms with members;
- Initialize dispute resolutions.
- Scan documents.
- Stock all marketing displays
- Serve as a back-up for other departments as necessary and cross train employees in accordance with credit union policies and procedures.
- Keeping informed about credit union promotions and programs.

### **EXPECTATIONS:**

1. To provide friendly, prompt professional and accurate service and support to all members and co-workers.
2. To maintain an excellent knowledge of financial services offered by the Credit Union
3. To maintain a professional work environment and businesslike appearance.
4. To adhere to company policy regarding attendance and punctuality.
5. To participate as a team member in the department.
6. Cross-train in other departments as needed and attend all training relative to position.

**QUALIFICATIONS AND POSITION REQUIREMENTS:**

- Experience: Two years prior banking or customer service/ sales capacity experience.
- Education: A high school education or GED
- Interpersonal Skills: Must have a pleasant personality with the ability to communicate effectively through various channels; the ability to get along with co-workers and members; must be dependable and punctual; must be able to retain confidential information and make mature and professional decisions based on knowledge of Credit Union policies and procedures.
- Other Skills: Must possess the ability to clearly and effectively express ideas and thoughts, via written or spoken methods; basic reading, arithmetic, and clerical skills; ability to cross-sell services and products when appropriate; maintain a working knowledge of credit union products and services; must possess a "service" attitude and be willing to accept direction, new ideas, and adapt to change; must be able to demonstrate active problem solving skills with a focus on service.

***I have received and reviewed a copy of this original position description.***

Date: \_\_\_\_\_

Signature: \_\_\_\_\_