

**Division:** Member Experience  
**Reporting to:** Manager, Business Services  
**Career Level:** Staff  
**Pay Type:** Salaried

**Job Overview**

The Account Manager, Business Services is accountable for delivering unforgettable service to existing and new Business Members while embedding FirstOntario Business into the community to become the business lender of choice.

**Role**

***In the role, you will...***

- Passionately put into action a disciplined sales and service leadership plan and processes that make your business results soar and share successes with the team
- Truly believe in our products and services and be able to communicate to business members and future business members how we can improve their financial lives
- Identify areas of opportunity within sales targets in a timely manner and implement action plans
- Effectively use campaigns developed by business partners to achieve annual financial targets
- Proactively build your network while using effective prospecting strategies to attract new business opportunities
- Always be “in the know” regarding local market activities and our competitive position relative to other financial institutions
- Be actively involved in the local business community by joining various local business associations and attending/representing FirstOntario at business lunches and dinners which can occur outside office hours
- Be a trusted advisor to your members and provide credible advice through dedicated support and service that leads to increase share of wallet targets
- Proactively develop and implement a plan to keep 3<sup>rd</sup> Party Generated Business on the books and consolidate other products
- Be a key partner to Wealth, Commercial and Retail banking to support business objectives and to provide a full service experience to our members
- Keep on top of Risk Management duties including but not limited to credit quality checks, control procedures and audit
- Proactively manage your Credit Portfolio’s credit reviews such that they are completed in advance of their annual expiry dates, which may include but is not limited to tracking, pursuing and analyzing annual reporting requirements from each Member in a timely manner
- Regularly provide support to your team members to enable them to have confidence in what they do
- Perform other duties we may need you to do

***As a team member, you will***

- Exude your upbeat energy and enthusiasm each and every day
- Celebrate the success of your team members by recognizing their contributions and achievements
- Align your values with the Mission, Vision and Values of FirstOntario
- Be a role model for FirstOntario’s organizational culture by creating a positive impact at every touchpoint with people, with every word you say or put in print and everything you do
- Communicate in a fashion that is respectful and well understood
- Collaborate with your peers to collectively think of innovative ideas that drive business
- Build and utilize working relationships with internal business partners across the organization and external business contacts
- Actively participate in community events as part of FirstOntario’s overall commitment to Corporate Social Responsibility
- Effectively control allocated budget dollars to assist with achieving the organization’s fiscal budget
- Be a change leader as we to adapt to new and exciting ways of delivering business services
- Consider health & safety as a primary concern to ensure the overall well-being of self and others

**Required Skills**

*Within your skills and qualifications, you will...*

- Have a post-secondary diploma or degree in Business Administration, Commerce and/or Economics or the equivalent of industry experience
- Have a strong business acumen from your 4-6 years' tenure in Business/Commercial banking or experience from other Member facing and/or Credit adjudication roles
- Relish in the opportunity meet new people, develop meaningful business relationships and leveraging valuable centres of influence within the community
- Stay abreast of all credit and investment product and services and stay current on our processes
- Have sound experience with day to day banking policies and procedures including but not limited to cash custody, safeguarding and clearing
- Be confident and skilled in taking initiative, assessing requirements, developing plans and taking the lead in making plans a reality
- Demonstrate your sales management skills in setting and monitoring sales targets, plans, pipelines and activities
- Enjoy a challenge in all that you do and be resourceful in the way you find solutions
- Be a true leader in every aspect of the word who consistently walks the talk and demonstrates an overly positive attitude
- Be quick to respond to requests for service from all of your clients
- Naturally foster high employee engagement, team spirit and rally the troops
- Openly share your knowledge with your team and tell stories to inspire them
- Genuinely care about people
- Inherently demonstrate a high level of integrity and be trustworthy
- Be more than approachable with your superior interpersonal skills
- Innately demonstrate superior communication and presentation skills
- Use your courage to take action in difficult and challenging situations and deal with uncertainty
- Do the right things for the right reasons
- Be aware of and mitigate enterprise risk factors and ensure compliance with applicable regulations, legislation and FirstOntario policies and procedures
- Be willing to work flexible hours including evenings and weekends as the job demands and travel to meet your member's needs
- Embrace the philosophy of lifelong learning
- Sincerely show in every aspect of what you do that you are a great employee and dedicated team member of the fastest growing Credit Union in Canada

*Accommodations for persons with disabilities are available upon request during the application process.*