

Job Description – Member Service Representative

Division: Member Experience
Reporting to: Branch Manager
Career Level: Staff
Pay Type: Hourly
Classification: XXX

Job Overview

The Member Service Representative is responsible for providing prompt, efficient and courteous transactional sales and service to Members and proactively assist Members to ensure that their needs have been met.

Role

In the role, you will be responsible for the following:

Sales & Service:

- Provide prompt, accurate, efficient transactional sales including but not limited to drafts, AFT, bill payments, direct debit, stop payments, bill payment setup, deposits, withdrawals, cheque cashing, Member cards and pinning, cheque ordering and general statement inquiries
- Recognize and act upon appropriate opportunities to engage Members in discussions to enhance their services with FirstOntario through providing advice on other products or consolidation of business held with competitors; refer to appropriate staff as required
- Track referral activity
- Actively contribute to campaign activity, as directed
- Adhere to Member Experience Standards with all Members and prospective Members that you come into contact with
- Put Member's, or prospective Member's needs for service and attention before any administrative/ operational work of your own
- Work with Member to resolve inquiries and/or concerns
- Refer to other available staff if "wait time" for other Members may be compromised
- Process transactions for other staff members, as required
- Perform retention activity (term maturities, etc.), when requested
- Promote all alternative delivery channels to the Member including but not limited to online banking, PAT, mobile banking etc.
- Assist in achieving the targets, goals and objectives relating to business development as set forth by the Branch Manager or designee

Operations:

- Adhere to policies and procedures at all times, as amended from time to time
- Complete all work accurately and efficiently
- Balance cash daily or as instructed
- Act as joint custodian and/or combination holder, as required (ATM, night depository, Treasury etc.)
- Perform custodian functions according to policy and procedures with respect to cash custody, safeguarding and securities. Place holds, messages etc. in line with policy
- Operate work within guidelines outlined in your "letter of authority"
- Assist with audits, processes and proofing, as required
- Assist in the daily upkeep of the branch including filing, sorting, scanning, etc.
- Consider health & safety as a primary concern to ensure the overall well-being of the branch and members
- Perform other duties as we may need you to do

Required Skills and Qualifications

- Completion of Grade 12 or equivalent
- Up to 1 year of Credit Union or other Financial Institution or customer service experience
- Competent knowledge of Microsoft Office Suite, Temenos Banking System
- Must have superior interpersonal and communication skills

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- Inherently demonstrate a high level of integrity and trustworthiness
- Must be able to work well with minimum supervision
- Ability to effectively problem solve to find creative and beneficial solutions
- Be flexible and adaptable to changing priorities
- Ability to share knowledge and best practices
- Must be capable of working as a team player
- Receptive to feedback and coaching
- Work within established work hours to meet member service demands
- Must have a positive attitude and willing to go above and beyond
- Maintain current knowledge of the Financial Service Industry and trends
- Be able to take action in difficult and challenging situations and deal with uncertainty
- Do the right things for the right reasons
- Ability to identify and mitigate enterprise risk factors and ensure compliance with applicable regulations, legislation and FirstOntario policies and procedures

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