

JOB DESCRIPTION

Job Title: Member Solutions Representative

Dept./ Division: Member Solutions Centre, Retail Services

Reporting to: Manager, Member Solutions Centre

JOB PURPOSE

Provide prompt, efficient and courteous transactional sales and service to members. Proactively assist members to ensure that their needs have been met and refer to other staff, as appropriate. Professionally and efficiently perform sales, service, and operational accountabilities as outlined below.

Major Activities

Sales:

1. Provide prompt, accurate, efficient transactional sales to members over the phone and/or internet.
2. Recognize opportunities and act on all discussions with members to acquire more of their business, through qualified referrals to a member consultant or greeter.
3. Implement smooth referral process, whether for new or renewal business.
4. Use good judgment to determine whether to refer to personally sell.
5. Perform retention activity when requested.
6. Track all referral sales activity.
7. Actively participate in and contribute to all campaign activity, as directed.
8. Build positive relationships with internal partners to support each other's business goals.

Service:

1. Apply our "Member First" principles with all members and prospective members.
2. Adhere to "Service Standards" in all circumstances with members and fellow staff.
3. Promptly acknowledge members by name and refer them to a more appropriate staff member, if necessary, to fulfill members needs best.
4. Project a positive and professional image and attitude with members and fellow staff.
5. Work with member to resolve inquiries and/or concerns. Refer to other staff if 'wait time' for other members may be compromised.
6. Close all transactions with a positive statement and thank member for their business.
7. Develop and pursue a Personal Development Plan, jointly agreed to with the Manager for continuous positive development of skills.

Operations:

1. Adhere to policies and procedures, at all times.
2. Complete all work accurately, promptly and fully from beginning to end.
3. Act as joint custodian and/or combination holder, as required.
4. Perform audits, processes and proofing, as required.
5. Perform all other duties, as assigned.

Job Requirements

- Must have above average interpersonal and communication skills
- Must be able to work well with a minimum of supervision
- Must be capable of working as a team player, willing to assist other staff as required
- Must have demonstrated service abilities and be able to identify member needs cross selling certain products and referring smoothly to others, as appropriate
- Must be willing to learn and apply coaching
- Must be flexible and prepared to work hours established to meet member service demands

Job Specifications

- Grade 12 or equivalent
- 3 years office, credit union / bank cash experience
- On-line exposure
- Typing 30 WPM

Contacts

Established contacts with:

- Branch management and all staff, other department/division staff
- Members, prospective members

Physical Demands/ Working Conditions

- Normal office environment.