

## Job Description – Personal Assisted Teller

**Division:** Member Experience  
**Reporting to:** Manager, PAT  
**Career Level:** Staff  
**Pay Type:** Hourly  
**Classification:** XXX

### Job Overview

The Personal Assisted Teller (PAT) is responsible for providing prompt, efficient and courteous transactional sales and service to Members. Working with Branch Management and staff as well as other departments and divisions within FirstOntario Credit Union, this role will ensure and promote established contacts with Members and prospective Members. Proactively assists Members to ensure that their needs have been met and refer to other staff (team), as appropriate.

### Role

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

#### **Sales and Service**

- Provide courteous, prompt, accurate, efficient sales and services to Members through virtual channels
- Recognize and act upon appropriate opportunities to engage members in discussions to enhance their share of wallet by providing advice on other products, utilizing referral standards, or consolidation of business held with competitors
- Contribute to sales targets as outlined within the yearly business plans
- Actively contribute to campaign sales activities, as directed
- Build positive relationships with internal partners to support each other's business goals
- Apply Member Experience standards with all of our current and prospective Members
- Enhance the member experience by providing exceptional, professional and consistent Member service using ITM technology, which includes but is not limited to: performing accurate transactions, greeting the Member, smiling, using the Member's name during the transaction and thanking each Member for their business
- Provide consistent positive memorable Member experiences
- Work with team members to resolve inquiries and/or concerns
- Assist other members of the team if "wait time" for other members may be compromised, by troubleshooting, providing coverage for other team members, as required
- Place a Member's, or perspective Member's needs for service and attention before any administrative or operational work of your own
- Keep Member contact diary system up to date with relevant follow up action (MRM)
- Maintain ongoing operational/administrative work without sacrificing Member service
- Maintain records and documentation, as required
- Actively participate in team meetings, as required

#### **Operations:**

- Perform administrative duties and special projects as assigned
- Adhere to policies, procedures and standards
- Complete all work accurately and efficiently
- Perform all audits, processes and proofing, as required
- Maintain a clean and safe workstation at all times
- Responsible for all existing virtual programs, subsequent and evolving virtual channels
- Consider health & safety as a primary concern to ensure the overall well-being of the department
- Complete sundry as well as other duties required by the Manager, PAT
- Perform other duties as we may need you to do

### Required Skills and Qualifications

- Grade 12 or equivalent
- 2 years Credit Union or other Financial Institution experience
- Be comfortable, professional and friendly on camera

## **Job Description – Personal Assisted Teller**

- Ability to talk and type simultaneously
- Competent knowledge of Microsoft Office Suite, Temenos Banking System and Cardtronics or equivalent banking platforms
- Must have superior interpersonal and communication skills
- 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
- Ability to multi-task by operating multiple monitors and software systems at the same time
- Must be flexible and prepared to work hours established to meet Member service demands
- Must be capable of working as a team player, willing to assist other staff of any location
- Receptive to feedback and coaching
- 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.*