

JOB DESCRIPTION

Position: Senior Member Service Representative
Reports to: Assistant Manager

Group: 3

Primary Responsibility/Basic Purpose:

Under limited supervision, the Senior Member Service Representative is responsible for providing support to the membership, co-workers and branch management on a regular basis. Coastal Community strives "to be the leaders in building relationships that improve financial health, enrich people's lives and build healthier communities."

It is the responsibility of the Senior Member Service Representative to carry the vision statement forward in order to build, maintain, attract and expand the member's relationship with Coastal Community. The Senior Member Service Representative provides friendly, professional service in an efficient and financially responsible manner. This position has the freedom to act, and although must refer non-routine decisions to others, will work under limited supervision rather than direct supervision.

Representative Duties:

Provide support and back up as required and as needed by the branch for the following:

1. Assist the management team with performing the daily operations of the branch as required
2. Opening and closing the branch when required
3. High level knowledge of policy and procedure
4. Provide advice and assistance to employees as required
5. Actively support the team environment by demonstrating an enthusiastic approach to and reinforcement of the sales culture
6. Act as a positive resource and mentor for team members and lead by example
7. Take responsibility for self-development and continuous learning to maintain and achieve the required knowledge for the position
8. Duties will also include those already laid out in the existing MSR 2 job description.
9. Will serve members and potential members as part of the daily and regular accountabilities of the MSR 2 position

Other duties would include:

10. Look for efficiencies, assist in reviewing processes to identify improvements, make recommendation to existing policies and procedures;
11. Foster relationship building through service excellence and product knowledge;

Required Qualifications:

- Minimum of three to five years' financial service experience or an equivalent combination of education and experience.
- Successful completion of CUIC 185 and/or CUIC 200.
- Successful completion of the MSR II course and exam.
- Successful completion of the Senior MSR training.

- Advanced knowledge of all Coastal Community products and services.
- Advanced knowledge of all Coastal Community policies, procedures and applicable legislation.
- Advanced knowledge of the banking system.
- Actively pursuing the CUIC Fellowship Designation and/or other related education.
- Above average MSR II skills and duties.
- A proven sales record.
- Excellent written and verbal communication skills.
- Demonstrated leadership skills.

Required Abilities:

- Proficient with the Windows suite of programs.
- Ability to utilize sound judgement in developing recommendations/decisions.
- Ability to build member relationships resulting in expanded share of wallet.
- Ability to multitask while providing quality service.

Skills to Benefit this Position Include:

- Member Service Skills
- Time Management Skills
- Interpersonal Skills
- Problem Solving Skills