

JOB DESCRIPTION

Position: Senior Operations Service Representative
Reports to: Assistant Manager

Group: 3

Primary Responsibility/Basic Purpose:

Under limited supervision, the Senior Operations Service Representative is responsible for providing support to the membership, coworkers, branch staff and department 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 Operations 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 Operations 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 department for the following:

1. Routine Scheduling
2. Proficient in 4 separate department positions
3. The go-to person for the 4 areas of proficiency
4. Training other employees
5. High level of knowledge in policy and procedure
6. Provide advice and assistance to employees as required
7. Actively promote the department’s role by demonstrating an enthusiastic approach to and reinforcement of the support function to the branches
8. Act as a positive resource and mentor for team members and lead by example
9. Take responsibility for self-development and continuous learning to maintain the required knowledge for the position
10. Perform other related duties as required
11. Duties will also include those already laid out in the existing OSR 2 job descriptions.

Other duties would include:

12. Look for efficiencies, assist in reviewing processes to identify improvements, make recommendations to existing policies and procedures;
13. Foster relationship building through service excellence and product knowledge;
14. Provide assistance to Assistant Manager as needed

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.
- 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 in four existing Operations Service Representative group 2 job duties.
- Excellent written and verbal communication skills.
- Demonstrated leadership skills.
- Advanced understanding of legislation and regulations and how they apply to the policies and procedures of the organization.

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:

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