

## **POSITION DESCRIPTION**

<b>Title</b>	<b>Member Service Supervisor I</b>
<b>Reports to</b>	<b>Manager of Regional Relationships</b>
<b>Created</b>	June 2019
<b>Job Level</b>	4

## **BASIC PURPOSE**

The Member Service Supervisor I is responsible for the leadership, coaching, growth and development of the Credit Union's front-line member service team. This team provides members with a variety of cash and non-cash related products and services with professionalism and responds to a variety of member and potential member inquiries. The Member Service Supervisor I works with the Manager of Regional Relationships to implement and monitor the Credit Union's short and long-term goals, plans, and policies and shares in the responsibility for business growth of the branch. The Member Service Supervisor I demonstrates Diamond North Credit Union's vision and commitment to the Credit Union's membership and to co-operative principles.

## **MAJOR RESPONSIBILITIES**

### **Leadership**

- Work closely with the Manager of Regional Relationships and the Credit Union's teams to build and enhance the sales and service culture;
- Promote the Credit Union's strategy (vision and mission) in all dealings, building a consistent, recognizable, and positive differentiation for the Credit Union in our communities and among our peers;
- Establish and enhance the Credit Union's profile in the external community by participating in branch, business and community activities and creating opportunities to build business;
- Monitor the general economic environment and anticipate relevant trends.

### **Sales and Service**

- Coach and motivate staff to achieve portfolio and revenue growth, and sales and service objectives/targets by strengthening and deepening member relationships;
- Identify opportunities to increase share of wallet and portfolio balances by applying ethical sales and service principles, practices and techniques;
- Lead in the generation of referrals to the Credit Union's internal and external partners;
- Identify and assess competition and opportunities to acquire new business;
- Identify and close gaps in service with front line staff;
- Leverage external partner relationships;
- Take ownership of sales and service satisfaction by acting as a member advocate in resolving problems/issues tactfully and effectively in accordance with Credit Union policy;
- Respond to member inquiries by providing information on a full range of investment/estate/deposit products and services. Refer as required;
- Understand and complete all types of member transaction such as deposits, withdrawals, loan and teller bill payments, money orders, credit card advances, foreign currency exchange, etc.;
- Balance all transactions, vouchers, and cash to daily reports;
- Open new accounts and close existing accounts upon member or internal credit union requests;
- Ensure that automated banking machines are accurately balanced, reconcile variances, and initiate corrective action where problems exist;

## **Leading People**

- Provide personal leadership that encourages a culture and atmosphere that embodies the Credit Union's values including respect, service to members, accountability and collaboration;
- Lead, mentor, coach and develop the Credit Union's branch teams, as assigned;
- Participate in the interviewing and hiring process of employees, where required, in conjunction with the Human Resources department;
- Contribute to the development of branch deposit strategies for the benefit of the Credit Union and its members;
- Organize, schedule and monitor staffing activities to ensure maximum service levels are being provided to members effectively and efficiently;
- In conjunction with the Manager of Regional Relationships, establish performance standards, conduct performance appraisals, identify training and development needs of staff; and, with the Human Resources department, initiate appropriate disciplinary action;
- Cross train staff and provide support to other positions as identified by the Manager of Regional Relationships.

## **Relationship Management and Planning**

- Lead the application of sales and service principles, practices, and techniques to support the achievement of target level sales of lending as well as deposit products and services;
- Assess and prioritize customer relationships to support overall growth in retention and share of wallet;
- Enhance existing relationships to increase revenue by proactively uncovering potential for growth and exploring opportunities;

## **Risk Management**

- Understand deposit risks and take appropriate actions as they relate to the provision of deposit services;
- Strictly maintain the confidentiality of both member and Credit Union information to protect and ensure compliance with Credit Union policies and procedures;
- Manage risk and minimize losses through monitoring various reports and taking appropriate action ensuring compliance requirements, audits, and verifications are completed in accordance with Credit Union policies and procedures;
- Take ownership of the risk as part of the first line of defense by ensuring recommendations are made in accordance with sound principles and in compliance with policies and related procedures;
- Maintain member information in an organized fashion; ensuring documentation and tracking are completed as appropriate and that information is captured and presented in a fashion that maximizes the use of the Credit Union's technology;
- Ensure adherence to all aspects of our Code of Conduct and Ethics, including individual accountability as it relates to potential conflicts of interest, safeguarding of member information, and disclosure of outside business activities;

## **Regulatory Requirements**

- Support and advise all branch employees in fulfilling their fiduciary and strategic responsibilities;
- Keep the Manager of Regional Relationships and, as required, members of the operational management group, informed of the branch's financial condition and of major issues and developments that may affect the Credit Union;
- Understand regulatory and compliance requirements that include, but are not limited to, Anti-Money Laundering and Terrorist Financing Reporting requirements, consumer provision requirements, Privacy Act, and Market Code provisions and take appropriate action.

**QUALIFICATIONS & COMPETENCIES**

- A grade 12 diploma or GED and a minimum of 3-5 years of job experience is required;
- A certificate or other training in leadership or business administration is a definite asset;
- A demonstrated track record for success in the implementation and achievement of sales goals is a definite asset;
- Passion for co-operative values and for involvement with the local community;
- Exceptional interpersonal skills and demonstrated ability to build strong and respectful relationships with all parties including staff, peers, community, as well as current and potential business partners;
- Ability to make and deliver decisions respectfully and effectively;
- Exceptional verbal and written communication skills and ability to act as an effective spokesperson and ambassador for the Credit Union.

Position Specific Core Competencies		<i>Member Service Supervisor I</i>
<b>Communication</b>	To demonstrate comfort and skill in adapting communication styles to fit the needs of the audience within diverse situations, with the goal that the intended message will be fully understood and well received.	
<b>Coaching &amp; Mentoring</b>	To look for constructive ways to assist others in their growth towards meeting the expectations of the organization, as well as in the realization of their personal potential.	
<b>Analysis &amp; Problem Solving</b>	The ability to integrate and prioritize information with the goal to determine the sources of problems and define lasting solutions.	
<b>Judgment &amp; Decision Making</b>	The ability to quickly assimilate and assess information, followed by the application of sound logic and reasoning in the determination of a decision.	
<b>Member Service</b>	The ability to develop and maintain sincere relationships with our members that facilitate a full understanding (360 degree view) of their current financial situation, with a continuous eye to their future goals.	
<b>Products &amp; Sales</b>	To maintain a high level of understanding of all products & services offered by Diamond North Credit Union with the goal to be able to offer the perfect solution at the perfect time for our members. To be able to explain the options available in a way that builds quality relationships and provides full understanding to our members, so that they will feel confidence in the decisions they have made and ultimately in Diamond North.	
<b>Achievement &amp; Results</b>	The ability to demonstrate initiative, drive and success in the meeting of all business targets within the prescribed timeline.	
<b>Attention to Detail &amp; Accuracy</b>	The ability to provide & maintain consistently accurate results, through precise initial input of data through to the verification and correction of all errors.	