

# TRUMARK FINANCIAL CREDIT UNION

## JOB DESCRIPTION

**Job Title:** Member Experience Specialist  
**Department:** Member Experience  
**Reports To:** Retail Sales Manager  
**FLSA Status:** ST 60  
**Prepared Date:** February 2019  
**Approved By:** \_\_\_\_\_  
**Approved Date:** \_\_\_\_\_

**SCHEDULE** Monday through Friday, rotating nights and Saturdays when necessary

### **ACCOUNTABILITY OBJECTIVE:**

Responsible for enhancing and retaining member relationships through outbound calling efforts to new and existing members.

### **RESPONSIBILITIES:**

1. Thoroughly understands products and services along with benefits the credit union offers.
2. Use TruService Member Experience sales process during member interactions to discover member's unique needs to make recommendations on products and services to effectively cross-sell and educate existing and potential members; utilize good judgment when offering products and services to members/potential members.
3. On a daily basis conduct on-boarding and follow-up calls to memberships opened through alternative channels to form profitable relationships.
4. Responsible for member contact in product campaigns that are implemented by various departments.
5. Support Member Experience department with Voice of the Member program and member experience initiatives.
6. Support Loan Origination to conduct follow-up calls to online loan applications.
7. Responsible for making updates to CRM and prospecting database to document call efforts, activities, and results.
8. Conducts interview process for loan applications; make follow-up calls to review credit denials and approvals with members. Participate in ongoing CUNA Mutual training programs and methodically utilize the TIPS training to successfully cross sell the payment protection products.
9. Maintains and applies knowledge of Credit Union regulations to ensure full compliance with the law.
10. Remains active in credit union training programs. Complete the position's present curriculum as outlined by completing the following – credit union annual required compliance training and the supplemental courses listed within the prescribed time. Follows policy and procedure daily to ensure compliant with current regulations.
11. Required to attend Bank Secrecy Act training annually
12. Completes all other tasks, assignments or functions as assigned and/or required.

### **QUALIFICATIONS:**

**Education/ Experience:** A High School diploma or equivalent, with a good mathematical aptitude. Minimum of 1 year of branch and sales experience or equivalent experience with a financial institution. Prospecting and outbound sales experience and continuing education preferred.

**Other:**

- Professional demeanor, strong customer service skills with ability to adapt to all member situations
- Dynamic problem solving skills with ability to problem solve under pressure
- Demonstrates high-energy initiative
- Exudes enthusiasm, a positive attitude, and demonstrates strong cooperative skills
- Strong telephone and oral and written communicate skills
- Detail oriented and excellent organizational skills with the ability to multi-task
- Strong active listening and interpersonal skills
- Self-starting individual with the ability to work under limited supervision
- Thrives in fast-paced, team oriented environment
- Flex time may be necessary to meet the needs of the business
- Thorough understanding of all products and services, features and benefits as well as associated procedural details

**Language Skills:**

Ability to read, analyzes, and interprets compensation, tax, financial, legal, regulatory reports and documents. Ability to respond to common inquiries or complaints from members, regulatory agencies, or members of the business community Ability to effectively present job related information to employees.

**Physical Requirements:**

The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Must be available and willing to travel to such locations and with such frequency as the employer determines is necessary or desirable to meet its business needs. Must possess sufficient manual dexterity to skillfully operate standard office equipment including but not limited to: a computer, typewriter, adding machine, facsimile machine, photocopier, and telephone. A telephone device to enhance hearing will be provided if needed. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally required to stand; walk, sit; use hands to finger, handle or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; taste or smell. The employee must occasionally lift and/or more up to 30 pounds.

Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

**Availability Requirements:**

**Regular Hours and Attendance:** Must maintain regular and acceptable attendance and be available to work your normal scheduled hours per week. Or such hours per week as TruMark Financial determines necessary to meet the member's needs.

**Overtime, Weekends and Holiday Requirements:** Must be available to work overtime, weekends and holidays as TruMark Financial deems necessary to meet its business needs.

**Work Environment:**

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Employees must be able

to relate to other people beyond giving and receiving instructions: (a) can get along with co-workers or peers without exhibiting behavioral extremes; (b) perform work activities requiring negotiating, instructing, supervising, persuading or speaking with others; and (c) respond appropriately to criticism from a supervisor. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.