



Member Service Specialist

Reports To: Branch Manager, Assistant Branch Manager and Lead Member Services Advocate

FLSA Status: Non-Exempt

Job Description:

The member service specialist primary function is to fulfill Camino Federal Credit Union's members financial needs through effective profiling and guide them through a successful and rewarding experience in order to increase each member's profitability potential and to guarantee that every member, every time receives a warm and positive experience. Actively supports and promotes to both existing and prospective members. Takes ownership of every member every time and provides "Start to Finish" member service.

Major Responsibilities:

- Actively supports and promotes Camino Federal Credit Union's brand, statement of purpose and strategies.
- Responsible for following process improvement methodology as communicated through training and the credit union's overarching quality initiatives.
- Responsible for understanding and complying with Bank Secrecy Act regulations.
- Responsible for determining member's needs, and directing them to the proper services and resources for transacting business.
- Responsible for demonstrating excellence in member service by providing service in an efficient, friendly and professional manner, ensuring continuous improvement in member satisfaction.
- Displays a working knowledge of all credit union and ancillary service products and services in order to provide consistent and excellent member service.
- Responsible for preserving the retail image of the branch office by maintaining a superior appearance of professionalism, cleanliness, and organization.
- Responsible for coaching members in the usage of our technology/online services.
- Responsible for understanding profitability concepts and cross selling appropriate products & services to members to increase their profitability. Responsible for asking for the sale and closing the sale.
- Responsible for opening new membership accounts and cross-selling Camino Federal Credit Union's products and services.
- Responsible for setting up new accounts and new account features for existing members.
- Responsible for accurately coordinating all member account activities (fraud, stop payments, etc.).
- Responsible for trouble-shooting member account problems and implementing solutions that are best for the member and Camino Federal Credit Union.
- Responsible for resolving detailed member account issues.
- Responsible for completing the necessary documentation pertaining to account fraud as needed.
- Responsible for opening all of the accounts offered by Camino Federal Credit Union with supporting paperwork.



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- Accurately performs Corelation and supporting system functions as required.
- Responsible for accurately balancing assigned cash drawer and/or vault and CDM's.
- Responsible for meeting cash balancing standards established by Camino Federal Credit Union.
- Responsible for attending job-related training classes as required.
- Responsible for adhering to all Camino Federal Credit Union policies, procedures, standards, etc.
- Must meet minimum standards of sales performance and qualifies for incentive compensation based on meeting defined goals for production.
- Responsible for greeting members as they enter and leave the branch in addition to managing lobby traffic.
- Responsible for member outreach by making outbound calls for new account follow ups, and a variety of others service and sales follow ups.
- Other essential functions of the job may be assigned by your supervisor.

Educational Requirements:

- High school diploma or its equivalent is required, and some college is preferred.

Skills Required:

- Excellent oral and written communication skills.
- Excellent organizational and time management skills, with the demonstrated ability to manage and prioritize multiple tasks while under strict deadlines and constant interruptions.
- Ability to maintain a flexible schedule in order to attend training sessions that are held before or after regular retail hours.

Reasoning Requirements:

- Ability to act in a discrete manner when dealing with sensitive membership information (membership/account/loan denials, overdrawn accounts, etc.).
- A high degree of reasoning ability and good judgment in setting priorities and carrying out duties with supervision.
- Ability to make sound decisions regarding branch operations and member relations with confidence and firmness after assembling facts and weighing alternative solutions.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. 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 regularly required to use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is frequently required to stand, sit, walk; climb or balance; stoop, kneel, crouch, or crawl. The employee must regularly lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.



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Note: Job descriptions are not intended, and should not be construed to be exhaustive lists of all responsibilities, skills, efforts, or working conditions associated with a job. They are intended to be accurate reflections of those principal job elements essential for making decisions pertaining to compensation.

I have read, understand and have received a copy of my job description.

Employee's Signature

Date

Signature: HR or Supervisor

Date