



City Credit Union- Job Description
Job Title: Member Relationship Representative

Exempt:	No	Grade:	30
Division:	Branches	Department:	Branches
Reports To:	Branch Manager	Location:	

SUMMARY:

The Member Relationship Representative (MRR) is an entry level branch position in the MRA Career path. Responsibilities include: (1) providing exceptional service to City CU members and other associates; (2) identifying the financial needs of members and effectively offering solutions to fulfill member needs through product and service sales; (3) performing a variety of member transactions and functions; (4) meeting individual sales goals and assist in meeting branch sales goals; and (5) Supporting our CUSO and advocating for the members in the use of electronic services; and (6) performing other duties as assigned.

DUTIES AND RESPONSIBILITIES

- Process negotiable instruments and performs basic cash handling transactions including, but not but not limited to, deposits, withdrawals, transfers, loan payments, traveler checks, card services and other services.
- Open and close all membership accounts and services identified in MRR training and process authorized account changes.
- Explain, promote and cross sell City CU products and services.
- Support our Lending Program and CUSO through referrals.
- Meet individual sales goals and assist in meeting branch sales goals.
- Proactively respond to member inquiries and requests using product knowledge.
- Take ownership of resolving errors, member problems and/or complaints in a timely manner.
- Accurately balance cash drawers and maintain cash levels within designated limits.
- Adhere to applicable City CU policies and procedures.
- Remain current of our technology and advocate the use of our electronic services to members.
- Ensure compliance with Bank Secrecy Act (BSA), Anti-Money Laundering (AML) and Customer Identification Program (CIP) Policies and Procedures to ensure daily compliance with current regulations.
- Operate within the branch Service Plan and in accordance with City CU's Service Culture Vision and Standards.
- Work the Saturday Rotation as assigned.
- Volunteers as a representative of City CU in community and business development events.
- Performs all applicable job functions in accordance with established Credit Union BSA/AML/OFAC policies and procedures and completes required training on an annual basis.

SKILLS and ABILITIES:

- Ability to communicate effectively.
- Ability to organize work efficiently to meet deadlines.
- Ability to cross sell products and services.
- Ability to perform duties accurately and timely, despite frequent interruptions.
- Ability to operate City CU office equipment and machines.
- Ability to successfully complete the core competencies of CU@School.
- Ability to adhere to Expectations and Service Standards

SUPERVISORY RESPONSIBILITIES:

None required.

PERFORMANCE STANDARDS:

The Member Relationship Representative is expected to: (1) achieve individual product, service and sales goals; (2) ensure member transactions are performed in a timely, effective and accurate manner; (3) comply with all City CU policies and procedures applicable to this position; (4) be knowledgeable of City CU products, services, policies and procedures; (5) maintain an organized and secure workspace; (6) be professional in appearance and action; (7) report to work punctually as scheduled; and (8) maintain effective time management.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, the Associate must be able to satisfactorily perform the essential duties and responsibilities of the position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The requirements listed below are representative of the minimum knowledge, skills, and /or ability required:

- A minimum of 6 months of customer service and/or cash handling experience.
- Sales experience.
- Strong computer skills.
- Strong oral and written communication skills.

EDUCATION and/or EXPERIENCE:

High school diploma, college degree or related experience and /or training; equivalent combination of education and experience

OTHER SKILLS and ABILITIES

Ability to operate a personal computer including the ability to use: Focus XP and Meridianlink. Ability to operate: basic calculator or ten key adding machine by touch, financial calculator and copy machine.

Must be able to communicate effectively and proficiently, both verbally and in writing. Must possess a strong ability to interact with management, other associates and members in a positive and professional manner.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an associate to successfully perform the essential functions of this job. While performing the functions of this job, the associate is regularly required to use hands to finger, handle, or feel objects, tools, or controls; reach with hands and arms; talk or hear; and taste or smell. The associate frequently is required to stand, walk, and sit. The associate is occasionally required to stoop, kneel, crouch, or crawl.

The associate must frequently lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.