



EXCEL FEDERAL CREDIT UNION

POSITION DESCRIPTION

POSITION: Member Engagement Specialist

SCOPE: The position serves to deliver outstanding, professional phone and in-person service to members and potential members by effectively and efficiently identifying member needs, possessing strong communication skills with the ability to offer suitable products/services/solutions while building and deepening the financial relationship to make Excel FCU the member's most trusted financial partner.

AUTHORITY: Reports to Manager of Member Engagement and Lending

DUTIES AND RESPONSIBILITIES:

- Professionally greet and assist members and potential members in person and via phone.
- Effectively use active listening, research, and problem-solving skills to identify and offer solutions to members.
- Responsible for meeting deposit and loan goals by cross-selling products/services to new and existing members.
- Cross-sell appropriate products/services to new and existing members to include deposit products.
- Guide members through the car buying experience and lending guidelines for auto and personal loans as well as credit cards.
- Meet or exceed assigned operational, cross-sale, and organizational goals and objectives.
- Perform a wide range of transactional duties including but not limited to account maintenance, and opening several types of personal and business accounts with accuracy.
- Inform and educate members on the features and benefits of Excel FCU products/services.
- Represent Excel FCU and engage with potential members at community events to help generate new business and positive brand awareness.
- Basic (non-cash) teller transactions as assigned
- Complete loan applications with members
- Responsible for deposits and lending calls.
- Complete all assignments and assigned staff training on or before the deadline.
- Perform other duties as assigned by Member Engagement Manager.

Knowledge and Skills:

- 2-3 years of Banking and Lending experience
- 3-5 years' customer service experience in a call center or related customer service environment.
- Excellent listening skills, communication skills including written, verbal and telephone skills
- Strong attention to detail, focusing on accuracy and quality of work
- Proficient working knowledge of Microsoft Word, Excel, and Outlook
- Positive, pleasant, and professional demeanor.
- Strong commitment to providing follow-up and ensuring exceptional service is provided
- Ability to maintain confidentiality
- Ability to effectively multitask, while staying organized and maintaining good time management.
- Demonstrate decision-making skills
- Maintain current knowledge of the credit union's member service policies and procedures
- GA Notary public a plus
- Bilingual a plus

Education:

- A high school education or GED

Physical Requirements:

- Required job duties are essentially sedentary work consisting of listening, talking keyboard/computer entry, occasional walking, standing, and lifting/carrying up to ten pounds.
- Frequent surrounding noise (office machines, conversations of others, phones etc). Employees must have the ability to focus on task and members with moderate surrounding noise levels.
- Some weekend work is required to attend community events.