



## EXCEL FEDERAL CREDIT UNION

### POSITION DESCRIPTION

**Position:** Member Engagement Representative

**Scope:** Position serves as point of contact for Excel Federal Credit for members, non-members and potential members that visit in person or via phone. The Member Engagement Representative drives participation in programs, resolving inquiries, and supporting retention by delivering personalized communication and excellent service including distribution of correspondence and redirecting phone calls.

**Reports to:** Manager of Member Engagement and Lending

**Date:** 6/9/2026

#### Duties and Responsibilities

- Professionally greet and assist members/non-members/potential members in person and via phone.
- Appropriately answer and direct incoming calls.
- Perform account file maintenance for daily reports assigned.
- Receive, sort and distribute all incoming mail and deliveries.
- Collect and prepare outgoing mail for credit union.
- Assists in account research and members follow up as assigned.
- Basic teller transactions assigned
- Open member and business member accounts on-line and in person.
- To meet or exceed operational and organizational objectives.
- To assist staff to do the same by recognizing opportunities to cross-sell or refer business to sales team.
- Maintains inventory of related member engagement supplies.
- Complete all assignments and staff training assignments on or before deadline.
- Performs other duties as assigned by Manager of Member Engagement and Lending.

*\*\*\* The ideal candidate must be available to attend and actively participate in community events, demonstrating our commitment to fostering strong local relationships.\*\*\**

**Knowledge and Skills:**

- 1 year of similar or customer service-related work experience required
- Excellent people skills including a positive, pleasant, courteous and professional demeanor.
- Excellent listening skills
- Excellent written, verbal and telephone communication skills
- Ability to maintain confidentiality
- Ability to effectively multitask, while staying organized and maintaining good time management.
- Strong attention to detail, focusing on accuracy and quality of work
- Proficiency with computer equipment (printer, scanner, fax, postage machine) and working knowledge of Microsoft Word, Excel, Outlook
- Good decision-making skills
- Maintain current knowledge of 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:**

- Requires 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.