

POSITION INFORMATION	
Branch / Department:	Barrhead
Region:	Lloydminster
Position Title:	Member Service Representative I
Salary / Wage Range:	\$15.32 – \$20.99/hour
Hours:	Part Time Temporary
Closing Date:	August 16, 2010
Position Reports to:	Assistant Manager Member Service I
HR Contact:	Tara Smith, HR Specialist. 780.808.4786. To apply, please email resume and <a href="#">Internal Job Application</a> to <a href="mailto:Tara.Smith@servus.ca">Tara.Smith@servus.ca</a>

### STRATEGIC ROLE

As a member of a dynamic Retail Branch team, the Member Services Representative (MSR) plays an integral role in the delivery of superior personalized service to our member-owners. They build relationships with ease through the use of highly effective communication skills, while accurately and efficiently processing transactions and addressing member needs. The MSR exceeds member expectations by recommending, referring or providing products and services that enhance their financial well being. Through the achievement of individual and branch goals, the MSR assists in the attainment of corporate objectives that include; fostering an environment in which our members feel at home, perceive our staff as knowledgeable, and view Servus Credit Union as a good corporate citizen. As an ambassador of our Credit Union, you strive for excellence because you know that, as an MSR, you play a crucial role in the financial well-being of our members and the growth and profitability of our business.

### KEY RESPONSIBILITY AREAS

**Responsibility:**

**1. Member Service**

- Process transactions accurately and efficiently in accordance with established policy & procedures including, but not limited to, deposits, withdrawals, loans & utility payments, money orders, credit card advances, calculation of foreign and domestic exchange & cheque cashing.
- Maintain high levels of accuracy and efficiency to ensure daily balancing.
- Learn and apply knowledge of policies, procedures, and loss prevention guidelines in the performance of member transactions.
- Display attention to detail and prudent judgment in decision making process.
- Assist in branch administration functions as required.
- Assist other MSRs in balancing when required.
- Other duties as assigned.

- Provide our membership with the branded experience set out in our branch service standards.
- Build member confidence, loyalty, and trust through the delivery of superior personalized service, and the presentation of customized financial solutions.
- Make our members "Feel at Home" by meeting the branch service standards.
- Acquire full knowledge of our Mission, Vision, and the supporting statements in order to demonstrate Servus Credit Union's core values in all actions.
- Maintain a professional appearance and an organized workspace. Address the membership by their name.
- Resolve routine problems with member accounts and deposit instruments referred by members and other branch staff.
- Exceed member expectations.

## **2. Balancing and Security**

- Maintain high levels of accuracy and efficiency to ensure daily balancing.
- Adhere to all security procedures as they relate to the position.
- Act as joint custodian on specified combinations; rent, control and provide access to safety deposit boxes, maintain related records.

## **3. Sales, Marketing, and Promotion**

- Identify Member needs and provide effective financial solutions or make referrals.
- Participate actively in our sales and service culture by identifying member needs and opportunities to provide or refer products and services.
- Achieve or exceed assigned sales and referral goals. Enthusiastically participate in corporate and branch campaigns.
- Maintain a high level of product knowledge and communicate benefits to our membership. Ensure member inquiries are dealt with effectively.
- Listen to members, answer basic questions and refer complex questions. Match member needs to credit union products and services, and sell credit union products and services.

## **KEY EFFECTIVENESS SKILLS**

### **Key to success in this role is the ability to:**

- Actively promote Servus Credit Union's core values to the membership and consistently deliver our branch service standards at all points of contact.
- Monitor and manage branch traffic flow to maintain superior levels of member service.
- Recognize opportunities to match member needs with Servus products and services.
- Adhere to policies and procedures in order to mitigate risk of loss to Servus.
- Remain current on product knowledge with a focus on communicating the benefits to our member owners.

## Technical Competencies

- Demonstrates the ability to effectively multi-task.
- Demonstrates exceptional sales and referral skills.
- Strong problem solving and critical thinking skills to identify members' needs or concerns and recommend effective solutions.
- Effective communication skills; non verbal, written and oral.
- Demonstrates the ability to develop effective relationships with ease.
- Mentoring and training skills.
- Basic math skills.
- Must be comfortable operating within a Windows based computer program.

## Behavioural Competencies

- Contribute to a positive team environment.
- Ability to adapt to a changing, demanding environment.
- Commitment to ongoing education related to financial services.
- Self starter with the initiative and drive to provide superior personalized member service.
- Possesses integrity, credibility, reliability and displays prudent judgment.

## ORGANIZATIONAL CONTACTS

- Members/clients
- Potential members
- Branch or department managers
- Other staff
- Auditors or inspectors

## ESSENTIAL REQUIREMENTS FOR THE POSITION

### Experience:

- Prior retail experience, customer service or banking experience is essential. The ability to work quickly without sacrificing accuracy is essential.

### Education / Training

- Grade Twelve
- Business certificate, diploma, or degree is an asset

### Licenses / Certificates:

**Any other special requirements necessary to do the job:**