

Competition: 10-123-05

Closing Date: August 4, 2010

Location: 18th Street Crossing Branch - Lloydminster

Servus

The result of the amalgamation of Servus, Community and Common Wealth Credit Unions, Servus Credit Union Ltd, is the largest credit union in Alberta and third largest in Canada. A 50 Best Managed Company for 5 years with an asset base over \$9.5 billion, our service-driven philosophy and core values have fuelled years of innovation and growth, providing benefits for members, employees and their communities.

The Position

The Supervisor Member Service (SMS) is an emerging leader in a dynamic retail branch team, and ensures the delivery of superior levels of personalized service to our member owners. Their leadership and coaching skills are evolving; however they use their product expertise to assist their staff in helping identify member needs and recommending, referring or providing products and services that enhance their financial well being. They support their staff in the attainment of individual goals and branch and 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 emerging leader within our Credit Union you strive for excellence as an SMS, and you play a vital role in the growth and profitability of our organization, the financial well-being of our members, and the retention and engagement of our employees.

Principal Duties:

Member Experience (Adherence to our “Member’s First” Standards)

- Coach/Mentor/Motivate staff:
 - a) Coaching – develop consistent and formal coaching skills that include: service excellence, product knowledge, cross-selling, up-selling, the needs analysis process, negotiation, pricing and profitability.
 - b) Mentoring – to assist staff with career pathing, skill development, and ongoing learning.
 - c) Motivating – engage staff, assist in the development and implementation of branch campaigns, and reward and recognition programs.
- Identify, solicit, and close sales opportunities; offer appropriate Servus products and services to members in response to stated needs, as well as in response to clues indicating unstated needs.

- Understand and meet the needs of our members by providing them with advice on appropriate products and services, and/or identify opportunities to refer members to appropriate team members or external partners.
- Protect our member's financial well being through the sale of Travel Insurance and the referral of Home & Auto products.
- Achieve or exceed assigned sales and referral goals. Enthusiastically participate in, and assist in the creation of corporate and branch campaigns.
- Provide input into the development and support the achievement of sales targets and marketing plans.
- Provide competent and courteous service to staff and members at all times in a timely, friendly, and professional manner.
- Solicit new members; foster business development through service excellence and product knowledge.
- Maintain a professional image in the community.
- Acquire full knowledge of our Mission, Vision and the supporting statements and then demonstrate Servus Credit Union core values in all actions.
- Other duties as assigned

Financial Results

In conjunction with the Branch Manager, monitor and ensure branch goals are met or exceeded in the following areas:

- Loans
- Deposits
- Insurance Participation
- Other Income
- MasterCard Sales
- Operating Efficiency
- Profitability
- H.R. Efficiency
- Referrals: Wealth Management, Business Banking and Johnson Insurance etc.

Human Resource Management

- SMSs provide support, guidance, and training to all co-workers as necessary to ensure performance improvement and a cohesive team. SMSs lead by example and act as a positive role model for all employees.
- Manage the branch FTE complement by scheduling effectively.
- Identify employee developmental opportunities and provide effective coaching, support and technical training.
- Completes quarterly performance reviews for each direct report with a focus on skill development.
- Maintain a professional appearance, an organized, safe, and professional work environment.

- Motivates employees through the effective development and implementation and of reward/recognition programs.
- Holds weekly staff meetings that keep employees informed and include an effective business development and service component.
- Treats employees with dignity and respect and fosters a competent, positive, and expressive culture.

Risk Management

- Responsibilities also include auditing the accuracy and completion of documentation and ensure that staff adheres to policies, procedures, compliance, and loss prevention guidelines to mitigate the risk of loss to the Servus.
- Take necessary action on issues or concerns arising from the annual audits.
- Ensure necessary due diligence is taken to support the accuracy of all member transactions.
- Responsible for effective custody and control over cash holdings.
- Displays attention to detail, intuitive thinking and prudent judgment in the decision-making process.
- Adheres to authorization limits (includes Master Bond) and reviews and approves transactions for subordinates.
- Demonstrates an expert understanding of all branch security procedures and reviews regularly with staff.
- Adheres to all legislative and regulatory requirements (I.e. Privacy, Money Laundering)

Key to success in this role is the ability to:

Interpersonal/Communication

- Builds and sustains effective working relationships between staff, members, management, and community.
- Builds member and employee commitment to the success of our credit union
- Communicates clearly and concisely.
- Effective oral, written communication and listening skills
- Deals with conflict positively and supports others to resolve differences.
- Ability to engage, influence, negotiates, and motivates people.
- Basic public speaking skills/facilitation skills.

Leadership

- Build capability for change in other and demonstrate a positive attitude toward change.
- Recognition of and respect for people's diversity and individual differences.
- Coach, mentor, develop, influence and motivate employees.

- Facilitate interaction among people.
- Develop strategies to improve team, individual and credit union performance.
- Take responsibility for personal actions and the actions of others.
- Demonstrates integrity, credibility and prudent judgment

Teamwork

- Lead in team development and in identification of team roles, responsibilities and goals.
- Lead project teams and ensure collaborative relationships.
- Provide focus and direction.
- Recognize and celebrate team successes.
- Lead in development of strategies to improve team and individual performance.
- Empower team members to make decisions within the scope of their position.
- Actively participate in department/work unit and credit union meetings.
- Contribute positively to branch morale and a cohesive work environment.
- Maintain a responsive and respectful relationship with support departments.

Required Skills:

- Working knowledge of Word, Excel, and Outlook.
- Excellent verbal and written communication skills.
- Strong organizational skills.
- Detail oriented.
- Respond promptly and professionally to inquiries and requests made by staff or members.

Preferred Qualifications:

- This position is a natural step in the MSR II to Supervisor Member Service I to Assistant Manager, Member Services progression.
- Minimum 4-8 years experience retail banking experience

If you are interested in applying for this position please submit your resume to:

Servus Credit Union Ltd.

Sandi Unruh, HR Recruitment Specialist

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