

## Senior Member Relationship Representative

**Department:** Retail

**Reports To:** Branch Manager

**Exemption Classification:** Non-Exempt

### **Role:**

The Senior Member Relationship Representative (Sr. MRR) assists new and existing members with their financial needs, opens and closes various types of accounts, process transactions, resolves account issues, and provides assistance and information about other Credit Union products and services. This position is also responsible for meeting or exceeding their established sales and service goals; and has added responsibilities and higher limits for check negotiations. **The Sr. MRR assists the Branch Manager in managing daily branch operations, implement internal controls, policies and procedures and serves as the acting Branch Manager when applicable. The Sr. MRR applies specialized and expert skills and knowledge towards their daily tasks, responsibilities, and service, including but not limited to products and services, lending procedures, and operations.**

This role may be required to float to other branch locations periodically to provide branch support as needed.

### **Essential Functions and Responsibilities:**

- 60% Perform all Member Relationship Representative duties; assists members with opening and closing accounts (includes IRAs, business accounts, and charge off accounts), processing transactions, addresses and resolves member issues, inquiries, or complaints; sells and orders cash for the branch in accordance with Credit Union policies and procedures; balances and replenishes cash for vault and cash recycler; respond to external and internal inquiries, requests, and problems/complaints by resolving the issues directly and/or directing them to the appropriate person for specific information and assistance.
- 10% Identifies opportunities to cross-sell additional products and/or services to members; assess members' needs by asking appropriate questions to identify potential solutions in the form of Credit Union products or services; meets or exceeds established service and sales goals; processes member transactions efficiently and accurately; contributes to the branch goals by processing high volume with a sense of urgency; open and/or close branch according to security procedures; assists with the flow of branch traffic and adequate coverage to provide quality member services; ensure seamless branch operations in the absence of Branch Manager.

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- 10% Provide consultative services to members via telephone, email, or in-person about Credit Union products and services; act as a liaison between members and various departments; maintains accurate member account information on core system.
- 10% Assists in managing the security and safety of the branch by analyzing security and safety policies and procedures; adhere and comply with Credit union policies and procedures, regulatory compliance, and assigned training requirements; maintain confidentiality of Credit Union member and employee records during and after employment with the Credit Union; assist and support the Branch Manager with various administrative functions.
- 5% Assist in training and directing staff to accomplish branch goals; provide feedback for MRR performance evaluations and/or disciplinary process; float to other branch locations periodically due to business needs.
- 5% Performs other job-related duties as assigned.

**Knowledge, Skills, and Abilities:**

- High school diploma or GED required.
- Three to five (3 to 5) years of similar or related experience.
- Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for the purpose of giving or obtaining information which may require some discussion.
- MS Windows, Outlook, Word, and Internet proficiency.
- Employee must be professional, dependable, and flexible.
- Proficient working knowledge of financial institution operations and member experience strategies along with comprehension of complex compliance regulations.
- Proficient working knowledge of word processing, spreadsheet, and presentation software programs.
- Strong communication and organizational skills; ability to prioritize tasks and capable of working independently with minimal supervision.
- Professional and effective interaction, verbal, and written communication skills.
- Obtaining cooperation (internally and/or externally) is an important part of the role and a high level of interpersonal skills is critical to the success of this position. Role also requires the ability to motivate or influence others as a material part of the role, with a significant level of diplomacy and trust.
- Ability to travel to other branches to provide support; must possess a valid driver's license and reliable mode of transportation.

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**Physical Demands and Work Environment:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions however, no accommodations will be made which may pose serious health or safety risks to the employee or others, or which impose undue hardships on the Credit Union.

While performing the duties of this job, the employee is regularly required to sit and use hands to finger, handle, or feel objects, tools, or controls. The employee is frequently required to talk or hear. The employee is occasionally required to stand; walk, reach with hands and arms; and stoop, kneel, crouch, or crawl.

The employee must regularly lift and/or move up to 15 pounds. Specific vision abilities required by this job include close vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

The noise level in the work environment is usually moderate.

**This job description is not a complete statement of all duties and responsibilities comprising the position.**

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