

Job Title

Retail Relationship Manager

Short Description

The Retail Relationship Manager (RMM) is responsible for the development, oversight, and expansion of retail member relationships and member growth within an assigned geographical area. They engage in contact and follow up activities, pipeline management, sales calls, and other initiative-taking activities to acquire new retail members and contribute to deposit growth.

Full Description

Retail Relationship Manager

Purpose: The primary purpose of this position is to assist Atlanta Postal Credit Union to live out our Mission, "To help our members achieve financial success by providing exceptional products and service."

Summary: The Retail Relationship Manager (RMM) is responsible for the development, oversight, and expansion of retail member relationships and member growth within an assigned geographical area. They engage in contact and follow up activities, pipeline management, sales calls, and other initiative-taking activities to acquire new retail members and contribute to deposit growth.

Sales territories could include one or a combination of the following: Metro Atlanta, GA / Greater Savannah, GA, / East Metro, North to Northeast Georgia areas. We prefer this individual reside within their assigned territory.

Essential Duties and Responsibilities: Other duties may be assigned.

-Deliver outstanding service to both internal and external members that is in alignment with our Service Promises: I promise to be mindful of your time with fast, efficient, courteous, and friendly service.

I promise to demonstrate integrity in all my interactions.

I promise to always treat you with dignity and respect.

I promise to work with fellow employees throughout the credit union to ensure you receive the best possible products, service, and solutions.

I promise to safeguard the security and confidential nature of your financial information.

I promise to greet you with a smile and thank you for your business when your transaction is completed.

I promise to deliver on our mission to help you achieve financial success by providing exceptional products and service.

-Identify and acquire new retail members through prospecting, pipeline management, referral resources, community engagement, planned calling activities, and both in person and telephone outreach efforts.

-Develops and maintains a network of local market Centers of Influence (COI) contacts.

-Works collaboratively with APCU/Center Parc Business Relationship managers to acquire retail members by offering credit union membership to the employees of businesses for which the Business Relationship Managers have obtained a business membership.

-Engages with key decision makers to discover their business needs; Proactively identifies and successfully converts sales opportunities through needs-based conversations.

-Maintains awareness and focus on the strategic initiatives of the credit union and engages in activities that are likely to result in the furtherance or achievement of strategic objectives around growth and increased membership.

-Partners with internal stakeholders and functional support areas whenever collaboration is needed to ensure flawless onboarding of new members or a concentrated number of new members in one facility or location.

-Collaborates with branch managers with the assigned territory and with the resources of the member development department to avoid duplicity of activities and to identify whether a hand-off to the RMM would be appropriate or feasible.

-Offers appropriate products and services and guidance aimed at enabling prospective members to achieve their financial goals and meet their present and future financial needs.

-Facilitates the ability for the retail members to speak with internal business partners for resolution of inquiries and concerns that cannot be resolved by yourself.

-Completes member relationship-building assignments, such as follow up calls, pre-determined member contact intervals, incentive announcements, and acknowledgement of important dates (birthdays, anniversaries, etc.).

-Maintains up to date product knowledge; has a full understanding of the features and benefits of the related products and services offered by the credit union

-Maintains knowledge of diverse types of financial and economic concepts, membership geographic areas approved for APCU/Center Parc, and market segments that have been identified as part of the credit union's strategy.

-Effectively uses written and oral communication skills in daily correspondence and completion of tasks, interactions with members, staff, vendors, and regulators.

-Consistently communicates a positive and clear message around the credit union's strategic goals, objectives, and delivery of quality services to members.

-Complies with all aspects of BSA/AML, OFAC, NCUA regulations as they relate to this position.

-Demonstrates attention to detail, advanced analytical skills, and drive for results.

-Adherence to high ethics and accountability in all member conversations and product recommendations,

-Other duties as assigned.

-Supervisory Responsibilities: No direct reports. May manage day-to-day tasks through indirect reporting

relationships or through a matrixed management approach and the ability to collaboratively interact with internal and external partners.

Qualification Requirements: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/pr ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

REQUIRED Education and/or Experience:

A bachelor's degree in finance, accounting, business accounting, or related field or 2 additional years of specific work experience in lieu of degree
3 or more years of relative experience using a needs-based consultative sales structure
3 or more years of engagement in outside prospecting and sales activities
Microsoft Office software

PREFERRED Education and/or Experience:

A well-developed capability to analyze business financial statements
Working knowledge of retail banking services and product offerings
3 years specific B2C sales experience in a credit union

Physical Job Requirements:

Subject to business needs the position may require non-standard work hours (occasional evenings and/or occasional weekends), overnight travel less than 10%, and the ability to lift and carry weights of 5 to 20 pounds. Must be able to sit, stand, bend, or stoop as needed and the ability to interact with people in writing, over the phone, and in person as required. Must be physically able to operate a variety of automated office machines such as calculator, computer, printer, facsimile, telephone, copier, etc.

APCU Center Parc Credit Union is an equal opportunity employer committed to providing equal opportunities to applicants and our policy is not to discriminate against any applicant or employee based on race, color, sex, religion, national origin, disability status or veteran status or any other basis protected by applicable federal, state, or local laws. APCU Center Parc Credit Union prohibits harassment based on the same protected classes and criteria.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the job.

The requirements for the position listed are general and are not all inclusive. If you have any questions concerning this position, please contact Human Resources.

Please note that an employment offer, and your continued employment are contingent upon acceptable results of a background and credit check, and satisfactory proof of your right to work in the U.S.

Education	Bachelor's degree in Business or + 2 years related experience
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Additional Comments

Credit Union	APCU Center Parc Credit Union
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State	Georgia
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Contact Name	Ginger Wallis
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Expiration Date	05/30/2025
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