

Job Title AVP - Member Experience

Short Description The Assistant Vice President, Member Experience has the primary responsibility of service excellence and leading Associated Credit Union to become a best in class member experience organization. This role will leverage member insights to drive a unified member strategy and transform experiences across delivery channels and product lines. This role will become the architect of a member driven growth engine to maximize member acquisition, retention, and relationship growth. This leader will motivate, inspire, and engage all levels of the Credit Union to continually strive for service excellence and create a consistent member-centric mentality. The primary focus of this role is to analyze, develop, lead, and entrench a cultural transformation that results in new levels of excellence that are grounded in continuous improvement and innovative programs.

Full Description Position Description

Department: Member Experience
Reports to: Senior VP, Member Relations
Supervises: Direct Reports (x2)
Skill Level(s): Upper Management

Position Purpose

The primary purpose of this position is to assist Associated Credit Union in living out its Mission: To offer members financial products that fulfill their needs, service that exceeds their expectations, and relationships that inspire their trust.

The Assistant Vice President, Member Experience has the primary responsibility of service excellence and leading Associated Credit Union to become a best in class member experience organization. This role will leverage member insights to drive a unified member strategy and transform experiences across delivery channels and product lines. This role will become the architect of a member driven growth engine to maximize member acquisition, retention, and relationship growth. This leader will motivate, inspire, and engage all levels of the Credit Union to continually strive for service excellence and create a consistent member-centric mentality. The primary focus of this role is to analyze, develop, lead, and entrench a cultural transformation that results in new levels of excellence that are grounded in continuous improvement and innovative programs.

Essential Functions & Core Duties

- Act as a catalyst and promotor, managing and governing a Sales and Service Culture at Associated Credit Union:
 - o Drive the Credit Union to work together for optimum member experience delivery.
 - o Engage the Credit Union in managing member relationships, revenue, and growth.
 - o Create a persistent focus on the member in the actions the Credit Union takes.
 - o Accelerate transformation to a member driven growth organization

- o by ensuring decisions are viewed through the lens of the member.
- o Coordinate efforts with and make recommendations for any vendors that may assist with developing and maintaining the Sales and Service Culture.
- o Investigate, study, implement new practices, initiatives, and models in support of our service standards and enhancing sales and service performance in key areas.
- o Create a common language set and definitions for the member experience.
- o Ensure process and quality control by developing and implementing relevant quality assurance and measurement procedures.
- o Influence cross-functional agreement on how to deliver greatest value to members.
- o Develop tactical plans to deliver seamless Omni-channel member experience agnostic to product/service or platform.
- o Analyze and make appropriate recommendations for improving organizational health, member/employee satisfaction, and effective organizational decision-making.
- o Build a highly effective member listening path using multiple sources of insight that will tell the story of our members' journey and experience.
 - Responsible for coordinating and improving the member experience across the entire organization.
- o Advocates seamless member experience regardless of platform and ability to migrate between functions (new membership, onboarding, service, and obtaining additional products & services) to provide Omni-channel functionality.
- o Consult and support in their role as cultural leaders in the member-centric transformation journey.
- o Instill the discipline of process change and change management into Associated Credit Union. Lead efforts to move from being a reactive "fix-it" process to being a proactive solution-building environment.
- o Work with staff to measure, manage, and take action on member feedback:
 - Develop surveys and talking points to help staff engage our members to drive increase member participation.
 - Develop member feedback dashboards base on branch area, branch location, branch manager, and staff.
 - Review feedback and over positive reinforcement to staff to encourage increased results.
- o Lead creation and adoption of Sales and Service Culture methodology across the Credit Union, including, but not limited to: processes, departmental workflows, tools, and best practices.
- o Gain knowledge of our members and how we can be their single source for all their banking needs.
 - Responsible for coaching and developing staff at all levels for the Sales and Service Culture.
- o Work in conjunction with Managerial staff to help improve overall employee performance.
- o Consult and provide feedback on employee's performance program.
- o Performance Plan:
 - Assist with developing baseline results and set goals for

employees, branches, and branch managers.

- Analyze and optimize to continually improve performance.
- o Create a unified platform (dashboard) for understanding and taking action. Establish member experience benchmarks across key areas of member interaction, implement any additional metrics required to understand performance and provide ongoing reporting.
- o Regularly coach and provide feedback to the team leads to enable them to have confidence in what they do, help them grow and drive to excel.

Other Duties & Responsibilities

- Maintain open lines of communication with key stakeholders for the purpose of interdepartmental collaboration.
- Maintains knowledge of current federal and state regulations governing credit unions.
- Complete special projects as assigned.

Qualifications

Education: Bachelor's Degree in business, organizational development, management, or equivalent knowledge required.

Experience: Minimum of ten (10) years of progressive experience in member service and leadership roles. Experience working in complex environments with a high degree of organizational effectiveness.

Core Competencies:

- Strong empathy for members and passion for growth.
- Must have a thorough understanding of member service issues and concerns.
- Enthusiastic and creative leader with the ability to inspire others and a passion for delivering best in class member experience.
- Diplomacy, an innovative spirit, member service excellence, and data-driven mindset.
- Superior interpersonal and collaboration skills and proven track record in effectively achieving results in a cross functional environment. Superior influencing skills.
- Outstanding ability to prioritize complex initiatives against business goals.
- Strong ideation skills – an idea generator – with ability to align and gain consensus for ideas.
- Excellent written, verbal, and presentation skills. Ability to communicate effectively at all levels of the Credit Union.
- Effective in finding workable solutions and organizational alignment in highly complex or ambiguous situations.
- Demonstrates leadership, decision-making, and team building skills.
- Ability to carry out instructions and exhibit advanced problem-solving skills.
- Proven ability to implement transformational programs, using business value as a driver.

General Operational Requirements:

- Thorough knowledge of credit union services and products.
- Understanding of related legal and regulatory requirements.
- Familiarity with Branch functions, policies, and procedures.
- Must be willing to travel to Atlanta-Augusta area branches.

Performance Metrics

- Membership growth and product penetration aligned with established goals.
- Effectively control allocated budgeted dollars to assist with achieving the Credit Union's fiscal budget.
- Efficient and effective delivery of the Credit Union's products and services in accordance with established policies and standards.
- Required reports and records are accurately and timely.
- Suggestions are provided for improved efficiency or effectiveness in operations.
- Branch transactions, loan volumes, expenses, and profitability are in line with Credit Union standards.
- Member satisfaction surveys.

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 - o Create a persistent focus on the member in the actions the Credit Union takes.
 - o Accelerate transformation to a member driven growth organization by ensuring decisions are viewed through the lens of the member.
 - o Coordinate efforts with and make recommendations for any vendors that may assist with developing and maintaining the Sales and Service Culture.
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 - ☐ Develop member feedback dashboards base on branch area,

branch location, branch manager, and staff.

☐ Review feedback and over positive reinforcement to staff to encourage increased results.

o Lead creation and adoption of Sales and Service Culture methodology across the Credit Union, including, but not limited to: processes, departmental workflows, tools, and best practices.

o Gain knowledge of our members and how we can be their single source for all their banking needs.

• Responsible for coaching and developing staff at all levels for the Sales and Service Culture.

o Work in conjunction with Managerial staff to help improve overall employee performance.

o Consult and provide feedback on employee's performance program.

o Performance Plan:

☐ Assist with developing baseline results and set goals for employees, branches, and branch managers.

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• Diplomacy, an innovative spirit, member service excellence, and data-driven mindset.

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- Outstanding ability to prioritize complex initiatives against business goals.
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General Operational Requirements:

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Performance Metrics

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Performance Metrics

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Position Purpose

The primary purpose of this position is to assist Associated Credit Union in living out its Mission: To offer members financial products that fulfill their needs, service that exceeds their expectations, and relationships that inspire their trust.

The Assistant Vice President, Member Experience has the primary responsibility of service excellence and leading Associated Credit Union to become a best in class member experience organization. This role will leverage member insights to drive a unified member strategy and transform experiences across delivery channels and product lines. This role will become the architect of a member driven growth engine to maximize member acquisition, retention, and relationship growth. This leader will motivate, inspire, and engage all levels of the Credit Union to continually strive for service excellence and create a consistent member-centric mentality. The primary focus of this role is to analyze, develop, lead, and entrench a cultural transformation that results in new levels of excellence that are grounded in continuous improvement and innovative programs.

Essential Functions & Core Duties

- Act as a catalyst and promotor, managing and governing a Sales and Service Culture at Associated Credit Union:
 - o Drive the Credit Union to work together for optimum member experience delivery.
 - o Engage the Credit Union in managing member relationships, revenue, and growth.
 - o Create a persistent focus on the member in the actions the Credit Union takes.
 - o Accelerate transformation to a member driven growth organization by ensuring decisions are viewed through the lens of the member.
 - o Coordinate efforts with and make recommendations for any vendors that may assist with developing and maintaining the Sales and Service Culture.
 - o Investigate, study, implement new practices, initiatives, and models in support of our service standards and enhancing sales and service performance in key areas.
 - o Create a common language set and definitions for the member experience.
 - o Ensure process and quality control by developing and implementing relevant quality assurance and measurement procedures.
 - o Influence cross-functional agreement on how to deliver greatest value to members.
 - o Develop tactical plans to deliver seamless Omni-channel member experience agnostic to product/service or platform.
 - o Analyze and make appropriate recommendations for improving organizational health, member/employee satisfaction, and effective organizational decision-making.
 - o Build a highly effective member listening path using multiple sources of insight that will tell the story of our members' journey and experience.
- Responsible for coordinating and improving the member experience across the entire organization.
 - o Advocates seamless member experience regardless of platform and ability to migrate between functions (new membership, onboarding, service, and obtaining additional products & services) to provide Omni-channel functionality.
 - o Consult and support in their role as cultural leaders in the member-

centric transformation journey.

o Instill the discipline of process change and change management into Associated Credit Union. Lead efforts to move from being a reactive “fix-it” process to being a proactive solution-building environment.

o Work with staff to measure, manage, and take action on member feedback:

☐ Develop surveys and talking points to help staff engage our members to drive increase member participation.

☐ Develop member feedback dashboards base on branch area, branch location, branch manager, and staff.

☐ Review feedback and over positive reinforcement to staff to encourage increased results.

o Lead creation and adoption of Sales and Service Culture methodology across the Credit Union, including, but not limited to: processes, departmental workflows, tools, and best practices.

o Gain knowledge of our members and how we can be their single source for all their banking needs.

- Responsible for coaching and developing staff at all levels for the Sales and Service Culture.

o Work in conjunction with Managerial staff to help improve overall employee performance.

o Consult and provide feedback on employee’s performance program.

o Performance Plan:

☐ Assist with developing baseline results and set goals for employees, branches, and branch managers.

☐ Analyze and optimize to continually improve performance.

o Create a unified platform (dashboard) for understanding and taking action. Establish member experience benchmarks across key areas of member interaction, implement any additional metrics required to understand performance and provide ongoing reporting.

o Regularly coach and provide feedback to the team leads to enable them to have confidence in what they do, help them grow and drive to excel.

Other Duties & Responsibilities

- Maintain open lines of communication with key stakeholders for the purpose of interdepartmental collaboration.

- Maintains knowledge of current federal and state regulations governing credit unions.

- Complete special projects as assigned.

Qualifications

Education: Bachelor’s Degree in business, organizational development, management, or equivalent knowledge required.

Experience: Minimum of ten (10) years of progressive experience in member service and leadership roles. Experience working in complex environments with a high degree of organizational effectiveness.

Core Competencies:

- Strong empathy for members and passion for growth.
- Must have a thorough understanding of member service issues and concerns.
- Enthusiastic and creative leader with the ability to inspire others and a passion for delivering best in class member experience.
- Diplomacy, an innovative spirit, member service excellence, and data-driven mindset.
- Superior interpersonal and collaboration skills and proven track record in effectively achieving results in a cross functional environment. Superior influencing skills.
- Outstanding ability to prioritize complex initiatives against business goals.
- Strong ideation skills – an idea generator – with ability to align and gain consensus for ideas.
- Excellent written, verbal, and presentation skills. Ability to communicate effectively at all levels of the Credit Union.
- Effective in finding workable solutions and organizational alignment in highly complex or ambiguous situations.
- Demonstrates leadership, decision-making, and team building skills.
- Ability to carry out instructions and exhibit advanced problem-solving skills.
- Proven ability to implement transformational programs, using business value as a driver.

General Operational Requirements:

- Thorough knowledge of credit union services and products.
- Understanding of related legal and regulatory requirements.
- Familiarity with Branch functions, policies, and procedures.
- Must be willing to travel to Atlanta-Augusta area branches.

Performance Metrics

- Membership growth and product penetration aligned with established goals.
- Effectively control allocated budgeted dollars to assist with achieving the Credit Union's fiscal budget.
- Efficient and effective delivery of the Credit Union's products and services in accordance with established policies and standards.
- Required reports and records are accurately and timely.
- Suggestions are provided for improved efficiency or effectiveness in operations.
- Branch transactions, loan volumes, expenses, and profitability are in line with Credit Union standards.
- Member satisfaction surveys.

This job description is not intended to provide an all-inclusive listing of related job activities. Management may request the incumbent to perform other related activities in place of or in addition to those representative activities noted in this job description.

Education

Bachelor's Degree in business, organizational development, management, or equivalent knowledge required.

Additional Comments

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Expiration Date	12/15/2021