

Job Title	Business Development Coordinator
Short Description	Handle all the Business Development for ACU
Full Description	<p>Position Description</p> <p>Department: Retail Services Reports to: SVP of Member Experience Supervises: None</p> <p>Position Purpose</p> <p>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.</p> <p>Business Development will have limitless sales potential as one network that generates qualified new business opportunities using exceptional relationship-building skills. The role will include driving increased member growth, cross-sell and revenue, and working with ACU teammates to identify, maintain, and expand opportunities within assigned Select Employee Groups (SEGs).</p> <p>Essential Functions & Core Duties</p> <ul style="list-style-type: none"> • Execute SEG goals in support of Associated Credit Union’s strategic plan developed by the SVP of Member Relations. • Actively pursue and identify new business opportunities, give presentations, and develop new SEG and business partner relationships for Associated Credit Union by following through on qualified leads and by identifying new prospective companies. • Work with marketing and branch team members to cultivate, develop, and leverage a working relationship with key contacts and employees within our current SEG base for expansion into the community. • Track and manage all SEG-related opportunities (i.e. Enrollment Effectiveness, New Account Apps, Participation Ratios, Issue Log, etc.). • Maintain updated contact information for SEGs to insure accuracy in CU-Force. • Create and develop promotional programs for specific large (Class A) SEGs. • Participate in SEG New Hire orientations, Benefit/Health Fairs, Open Enrollment, Membership Drives, and other employee meetings to further establish ACU brand/name recognition and to promote credit union benefits. • Develop, coordinate, and perform presentations, including speaking to small and large groups (i.e.: Chamber of Commerce, Rotary, etc.) for initial and subsequent signups with content consisting of an overview of ACU’s products, services, and current promotions. • Develop and perform financial educational workshops/seminars presentations at SEG locations and within our branch network. • Assist branch managers in working with their SEGs and

coordinate staffing with department supervisors for all business development events (i.e. Membership Drives, New Hire Orientations, Benefit/ Health Fairs, etc.). Also, responsible for any cash-on-hand during these events.

- Manage credit union sponsored events at assigned branches.
- Other duties as assigned.

Other Duties & Responsibilities

- Maintains in-depth knowledge of credit union products and services (rates, pricing, policies, etc.), to provide subject matter expertise to SEG representatives and potential members.
- Maintains current knowledge of industry trends, opportunities, channels, products and services.
- Comply with BSA regulations when performing all job requirements, and stay abreast of updates/requirements of BSA/OFAC/CIP through completion of training courses assigned annually by the Training and Development Department as well as at quarterly employee meetings discussing compliance activities.

Qualifications

Experience:

- Minimum of three years' credit union or banking experience in sales and/or business development, community involvement, and managing multiple projects.
- Must be proficient with the Microsoft Office Suite (Word, Excel, PowerPoint, and Outlook).
- Bilingual speaking a plus.

Education:

- Bachelor's Degree in Sales Management, Marketing, Business Administration, Communication, or related field is preferred.
- Outside sales experience is a plus, but not mandatory.

Core Competencies:

- Self Motivated: positive "can-do" attitude with an optimistic view of problem-solving and markets oneself for opportunities ~ makes things happen.
- Ethics/Integrity: maintain high standards of character.
- Communication/Interpersonal Skills: effective verbal and written communication with the ability to prepare and present seminars to small and large groups of individuals.
- Decision-making/judgment: ability to make prudent decisions that are timely, well researched, reflect an awareness of impact, and are consistent with ACU's strategic objectives and are in line with accomplishing goals.
- Outgoing: willingness to make contact with new business prospects in-person and via cold calls; sociable.
- Problem-solving: identify problems promptly, research and develop alternative solutions, and resolve issues in early stages.
- Time Management: effectively prioritizes tasks to use time efficiently and attend to a broad range of activities.

- Flexibility: ability to manage a hectic work schedule with minimal supervision.
- Teaming: the ability to work with all levels of personnel from different departments within a team environment on various projects.
- Organizational: ability to independently organize work to meet goals and deadlines.
- Member Focused: dedicated to meeting the expectations and requirements of internal and external members.
- Creativity: ability to generate ideas and solutions to promote effectively to SEG representatives, potential members, and co-workers.

Performance Metrics

To be determined once individual is in role 6 months.

Education	High School
Additional Comments	
Credit Union	Associated Credit Union
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Expiration Date	06/30/2022