

<b>Job Title</b>	Retail Services Assistant
<b>Short Description</b>	Manage and direct member ,vendor and guest traffic flow while engaging all guest to ACU.
<b>Full Description</b>	<p>M</p> <p>Position Description</p> <p>Department: Retail Services  Reports to: Vice President, Retail Services  Skills Levels: Administrative</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>The Retail Services Assistant is responsible for managing and directing member, vendor, and guest traffic flow, proactively engaging all guests in bringing the Associated Credit Union brand to life. This role acts as the first touch point and will be expected to assist members, vendors, and guests with their inquiries in an accurate, professional, and timely manner. This role must uphold credit union culture at all times while making everyone who enters the Main Office feel welcomed and valued. Responsible for providing additional administrative support for the Retail Services department by performing a variety of duties and responsibilities.</p> <p>Essential Functions &amp; Core Duties</p> <ul style="list-style-type: none"> <li>• Acts as an “ambassador of good will” <ul style="list-style-type: none"> <li>o Enthusiastically greet members, vendors, and guests with prompt, professional service.</li> <li>o Manage traffic flow by connecting members, vendors, and guests to appropriate staff. Responsible for signing individuals into the visitor management tool.</li> <li>o Assist with inbound phone calls, determining the nature of the call and relay detailed information to the appropriate department.</li> <li>o Assist with outbound phone call programs when appropriate.</li> <li>o Maintain the Lobby area and ensure supplies are adequately stocked.</li> <li>o Maintain and protect the credit union’s professional reputation.</li> <li>o Act as a liaison between guests and any department as necessary.</li> <li>o Anticipate members’, vendors’, and guests’ needs in</li> </ul> </li> </ul>

order to accommodate them and provide an exceptional member experience.

- o Troubleshoot and resolve member and internal inquiries in a timely and accurate manner.

- o Assist with the security of the member/guest area. Alert management of potential security issues.

- o Helps train back up support on the duties and responsibilities of a concierge or greeter.

- Provides administrative support to Member Relations and Retail Services Departments

- o Provide assistance copying, filing, and distribution of information and documentation when needed. Ensures appropriate records are maintained and required reports are prepared.

- o Receive and distribute packages or deliveries as needed. Assist with mailings by preparing labels and stuffing envelopes. Keep track of all outgoing overnight deliveries and call for pick-ups if appropriate.

- o Assists with the coordination of a variety of meetings and events; prepares all materials, secures location, organizes catering and provides further assistance as needed.

- o Prepares clear, accurate, and thorough correspondence, reports and other written materials.

- o Assists with special projects, performing research and compiling data as necessary.

### Other Duties & Responsibilities

- Develop an understanding of Credit Union history, culture, philosophy, organization, policies, and operational procedures.

- Ensure compliance with all applicable credit union policies and procedures.

- Keep members informed of credit union products, services, and policies.

### Qualifications

Education: High school diploma or equivalent

Experience: Minimum one to three years of member service experience in a financial retail, retail management, or hospitality environment preferred.

### Core Competencies:

- Positive and outgoing attitude. Must have a service-oriented mindset and be capable of making members, vendors, or guests feel valued and to ensure member concerns are handled in a professional manner.

- Ability to work independently, and as a team member, while using discretion in decision-making and sound judgment in problem solving.

- Excellent organizational skills.

	<ul style="list-style-type: none"><li>• Excellent verbal and written communication skills to effectively communicate.</li><li>• Ability to present a professional image to members, management, staff, vendors, and other contacts.</li><li>• Ability to handle multiple tasks by prioritized job responsibilities.</li><li>• Proficient in computer skills with MS Office (Word, Excel, Outlook) and Adobe PDF knowledge, with the ability to learn new software.</li></ul> <p>General Operational Requirements:</p> <ul style="list-style-type: none"><li>• Ability to work a shifting or flexible schedule.</li><li>• Ability to sit or stand for periods of up to one hour or more.</li><li>• Ability to lift or move up to 25 pounds.</li></ul>
Education	High school
Additional Comments	
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Expiration Date	03/29/2024