

Job Title Retail Services Specialist

Short Description This role focuses on three (3) key elements in its service delivery model within Retail Services: internal training, content management, and technical application support. The primary purpose is to support the Retail Services management team in the professional growth and development of Retail Services frontline and back office team members. Creates, implements, and conducts formal training for team members to enhance their skills, while providing quality service delivery to our members. This role is also responsible for partnering with business unit leaders to understand the learning priorities for each team within Retail Services, and then create, curate, and maintain knowledge assets to meet those needs. It is this individual's job to continually enhance the credit union's ability to provide clear, accurate, and current guidance for team members. This role helps manage the systems that directly impact Retail Services in an effort to maximize efficiencies. Also responsible for helping keep the connection between frontline and back office Retail Services staff to better serve the members.

Full Description

Position Description

Department: Retail Services
Reports to: New Account Supervisor
Supervises: N/A

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.

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Essential Functions & Core Duties

Train Now, Be A Champion Tomorrow

- Develops, implements, and delivers training materials and

programs in a logical, organized manner.

- Launches and maintains the new hire onboarding and cross-training learning plans.
- Maintains a refresher training plan to ensure continued, consistent on-the-floor readiness.
- Confers with the Retail Services management team as needed to gather knowledge of work situations which require training to better understand changes in policies, procedures, regulations, business initiatives, and technologies.
- Delivers effective interactive training sessions and materials that facilitate application of knowledge and learning.
- Develops training utilizing multimedia visual aids, web-based training, and reference work.
- Focuses on maintaining uniform operations (consistency) through the branch network as well as the back-office support team.
- Gauges the effectiveness of current training program to include ongoing employee observation with the goal of constantly enhancing the training program.
- Monitors individual trainee success/understanding and pivots training to accommodate individual needs.
- Updates and enhances existing programs as necessary to meeting the changing needs of the business by implementing new and innovative delivery methods.
- Responsible for ongoing communication regarding updates and new procedures.
- Participates in meetings, training sessions, and projects to obtain new information to be integrated into training materials.
- Models and teaches exceptional service delivery to provide memorable member experiences, resulting in improved engagement and positive feedback.
- Conducts needs-assessments and performance analyses to determine training needs.
- Monitors and maintains the Retail Services Continuing Education Program.

Develop Content That Matters

- Collaborates with business unit leaders to identify and understand the learning needs of the Retail Services Department, and then determine the best method to address those needs.
- Creates and maintains custom knowledge assets, such as knowledgebase content, standard operating procedures, PowerPoint presentations, and video tutorials.
- Curates and adapts knowledge assets from third parties, such as those available through vendor relationships, industry associations, and other training providers.
- Responsible for documenting all aspects and functions of Retail Services ensuring that manuals and the content within the Intranet are up to date.

Make Retail Service Applications Meaningful

- Ensures Retail Services is utilizing the full functionality of all systems used during daily operations (i.e. Symitar, MeridianLink, Engagement Management platform, ITC, Synergy, Ensenta, etc.).
- Ensures Retail Services is utilizing their systems correctly and as

efficiently and as cost effective as possible.

- Performs Admin functions and help maintain and update different systems as needed.
- Works with all areas of Retail Services as well as other business units to create and maintain workflows.
- Assists with the facilitations of multiple implementation projects that would impact Retail Services.

Other Duties & Responsibilities

- Stay apprised of current trends in training and applications related to Retail Services and make recommendations for enhancements to programs and service delivery as appropriate.
- Provides business assistance and guidance as necessary to Retail Services personnel to advise them of capabilities and limitations.
- Supports the Retail Services management team with research and testing.
- Maintains in-depth knowledge of Credit Union products and services (rates, pricing, policies, etc.), to provide subject matter expertise to the Retail Services Management team.
- Maintains comprehensive and up to date knowledge of banking regulations related to assigned job function. Complete or ensure all audit and security policies and procedures are followed in accordance with credit union policies and Federal regulations. Complete required compliance and job specific training. Familiarity and adherence of all Bank Secrecy Act requirements including the ability to identify and properly report fraudulent and suspicious activity.
- Participates in the Retail Services Continuing Education Program.

Qualifications

Education: An Associate's Degree in Communications, Business Administration or a related field from an accredited college is preferred. If no degree or certification, then a minimum of five (5) years of equivalent work experience is required.

Experience: Three (3) years in banking, business writing, or instructional content creation and/or technical writing is preferred. Must be proficient with the Microsoft Office Suite (Word, PowerPoint, Outlook, Teams, and Excel) or similar software programs. Knowledge of Jack Henry's Symitar - Episys or MeridianLink is a plus.

Core Competencies:

- Member Focused: proficient in anticipating member needs and taking the initiative to drive solutions in effective value-added ways. Courteous and professional member service attitude.
- Integrity: operate with complete transparency, and hold ourselves to high ethical standards. Act in the best interest of our membership, staff, and community, even when no one is watching.
- Committed: desire to make an impact in people's lives. We develop relationships that make a positive difference in the financial

lives of our members, team members, and community.

- **Communication/Interpersonal Skills:** adept at listening, questioning, explaining, and giving feedback. Ability to articulate and present different points-of-views on various operational topics with the proven ability to transfer knowledge and effectively present in a variety of formal and informal presentation settings: one-on-one, small and large groups, with Retail Services Management, team members, and third-party vendors. Effective business and technical writing skillsets.
- **Project Management:** ability to manage multiple projects/initiatives concurrently, work well under pressure in a fast-paced environment and adjust as needed to meet deadlines and fulfill objectives, both independently and as part of a team.
- **Accountability:** ability to hold self and others accountable for achievement of key results and to persevere through challenges, setbacks, or difficulties. We own, we learn, and we improve.
- **Teaming:** ability to work well with your retail team and other business units to achieve a shared goal or outcome in an effective way.
- **Self-Motivated:** strong work ethic along with an enthusiastic and passionate approach to one's work with minimal supervision. Ability to self-manage timelines and deliverables.
- **Time Management:** effectively prioritizes tasks to use time efficiently and attend to a broad range of activities. Ability to manage work efficiently and effectively and manage shifting priorities and carry-on through task completion.
- **Organizational:** ability to stay focused on different tasks, and use your time, energy, strength, and mental capacity effectively and efficiently in order to achieve the desired outcome.
- **Attentiveness to Detail:** demonstrates keenness while exploring the issue or topic at hand as well as issues surrounding it and reasons behind it. Takes thoroughness to a new level and energizes other colleagues to work carefully.
- **Problem Solving:** identify problems in a timely manner, research and develop alternative solutions, and resolve problems in early stages. Must be capable of breaking problems into component parts and addressing each individual issue in order to develop an appropriate thorough solution.
- **Reasoning:** ability to apply common sense understanding to carry out detailed but uninvolved instructions and to deal with problems involving few variables.
- **Operational Soundness:** thorough in-depth knowledge of Credit Union products and services and familiarity with Retail Services functions, policies, and procedures.
- **Tech Savviness:** spirit of continual learning and the ability to evolve their methods to adapt to the everchanging, technological work environment. Either proficient with basic video editing or willing to quickly learn basic video editing techniques.

General Operational Requirements:

- Work is performed largely in a pleasant office environment.
- Capable of quickly gaining proficiency in the types of technologies commonly used in the role, such as content management systems and editing tools, basic video editing software, remote presentation platforms, and others.

- Some travel may be necessary.

Performance Metrics

- Retail Services Learning Plan
 - o Universal Associates on-the-floor readiness / Back Office support staff readiness
 - o Operational efficiency
 - o Training experience satisfaction
 - o Employee engagement
 - o Change in performance ratings over time
- Content Management
 - o Accuracy and professionalism of communications and developed documentation.
 - o Minimum of 4-5 reviews, updates, or releases per month.
 - o Page visits / Time on page (Intranet)
- Technical Application Specialist
 - o Resolution time
 - o Maintains up-to-date products and solutions
 - o Adoption rate of new functionality
- Consistency and thoroughness in quality of work.
- Responsiveness to requests and ability to manage multiple tasks simultaneously while maintaining a positive and constructive attitude.
- Successful implementation of assigned projects and assignments within specified timelines.
- Continuing Education Program
- Staff readiness for increased responsibilities.

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	High school diploma
Additional Comments	Please complete an online employment application found @ www.acuonline.org/careers
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