

Job Title

Member Engagement Center Sales Representative I

Short Description

Jax Federal Credit Union is seeking a Member Engagement Center Sales Representative to serve as the resource within the Contact Center Sales area for new and existing member new accounts and loan needs. Maintain an extensive knowledge of all products and services to promote and cross sell through a consultative needs-based sales approach.

Full Description

Jax Federal Credit Union is seeking a Member Engagement Center Sales Representative to serve as the resource within the Contact Center Sales area for new and existing member new accounts and loan needs. Maintain an extensive knowledge of all products and services to promote and cross sell through a consultative needs-based sales approach.

Location: Park Street Building, 562 Park St, Jacksonville, FL 32204

Status: Full-Time (40 hours per week)

Major Duties and Responsibilities:

Manage and handle incoming new membership requests via phone and online that are not assigned to a branch. Manage and handle phone and online member loan requests. Cross sell products and services to the membership.

Follow up with members on documentation for account and loan requests. Actively upsell and cross-sell based on member needs. May conduct assigned outbound calling. Meet scorecard metrics to include new loan volume, high approval to book ratio, credit life and disability sales, GAP and warranty sales. Meet qualified investment referral goals.

Maintain acceptable deposit and loan quality assurance standards.

Administrative duties as assigned to include quality assurance of new accounts and new loans and the scanning of any documentation.

Follow up with members to obtain needed loan documents to complete loan requests, deposit documents to complete the account opening or closing process.

Model JAXFCUs service and sales standards in every interaction.

Possess a strong understanding of credit reports and consumer lending documentation.

Process and close all loan applications to include, consumer loans, VISA credit cards, Refer home equity loans to a MEC

Sales Rep II or III.

Attend training and other duties as assigned

Knowledge & Skills

Experience:

Six months to two years of similar or related experience, including time spent in preparatory positions.

Demonstrated success in a sales-related role. Prior call center or financial institution experience preferred.

Education/Certifications/Licenses:

A high school degree or GED is required.

Interpersonal Skills:

A significant level of trust, credibility and diplomacy is required. In-depth dialogue, conversations and explanations with customers, direct and indirect reports and outside vendors can be of a sensitive and/or highly confidential nature. Communications may involve motivating, influencing, educating and/or advising others on matters of significance. Typically includes subject matter experts as well as first level to middle managers.

Other Skills:

PC Skill Level: Intermediate to advanced knowledge and proficiency with MS Office Suite.

Telephone Etiquette: Good listening and strong consultative sales skills.

Accuracy: Strong attention to detail. Ability to make sound decisions with minimum information.

ADA Requirements

Physical Requirements:

While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is

frequently required to use hands to finger, handle, or feel. The employee is occasionally required to stand; walk and reach with hands and arms.

The employee must be able to work for long periods of time at one workstation while processing and receiving information through a phone queue. Associate must be able to wear a one or two ear piece headset.

The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

Working Conditions:

The noise level in the work environment is usually moderate to high.

Mental and/or Emotional Requirements:

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This job description is not a contract and should not be construed as a guarantee of employment for any specific period of time.

We are an Equal Opportunity Employer and do not discriminate against employees or applicants based on

race, color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

Education	A high school degree or GED is required.
Additional Comments	Please apply online by visiting: https://www.jaxfcu.org/careers/
Credit Union	Jax Federal Credit Union
State	Florida
Contact Name	Almee Haga
Email	ahaga@jaxfcu.org
Phone	904-475-8023
Fax	904-350-9356
Expiration Date	03/24/2023