

Job Title

Universal Associate II

Short Description

Position Purpose: The Universal Associate II will serve as a lead to the frontline team as well as performing sales and service duties. This role provides support to the frontline to ensure accurate transactions are processed efficiently and cross-selling opportunities are presented to the members. Universal Associate II (UA II) maintains a comprehensive product and service knowledge to promote, refer, and cross-sell the credit union deposit and lending products. The UA II adheres to established member service processes and standards to maintain consistency along with a high of member service. Maintain comprehensive knowledge and understanding of the credit union's policies and procedures as well as State and Federal regulations. This individual is expected to provide a variety of services, including processing savings accounts, checking accounts, and loan transactions. This position requires excellent customer service skills to ensure customer satisfaction and the ability to perform complex financial transactions. Universal Associate II will also assist in training new Universal Associate I (UA I) team members and serve as a lead resource to the UAI team. Must also pay close attention to detail to ensure transactions are completed accurately and be able to identify and address any suspicious or fraudulent activities. This role is essential to the successful and efficient operation of the credit union's frontline team. Only candidates committed to delivering excellent member experience with a desire to contribute to the credit union's growth while adhering to the policies, processes and regulations need to apply. Two or more years of related experience is required.

Full Description

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DUTIES AND RESPONSIBILITIES:

- Maintain thorough knowledge and understanding of frontline processes and procedures, including applicable policies and regulations.
- Train new and established frontline associates.
- Process all transaction types efficiently and accurately.
- Responsible for maintaining, securing, and balancing cash machines such as ATMs, cash recyclers, and cash dispensers, as well as any transactional activity.
- Opens all types of new accounts, completing all essential documentation for each.
- Thoroughly informed about all electronic services, with the ability to explain and assist members with setup and use.
- Presents the CU in a positive, inviting light by welcoming current and potential members.
- Uses each member's interaction and observations to strengthen and enhance the member experience through proactive quality conversations and relationship-building efforts.
- Actively seeks new business through referrals and member involvement, as well as developing and growing existing member relationships.
- Actively participates in marketing promotions.
- Assign tasks, respond to inquiries, resolve issues, assist with difficult transactions, and manage delicate member relations issues while overseeing the activities of the frontline (teller) operations area.
- Identify and resolve complex transaction and balancing issues and provide a resolution in a timely manner.
- Provides professional and courteous service to existing and new customers; receives and researches customers' questions and/or complaints and makes recommendations as appropriate.
- Maintains thorough knowledge of all products and services to strategically consult with and strengthen and enhance members' financial needs.
- Works cooperatively with management to effectively communicate and implement performance standards and sales objectives.
- Takes ownership and responsibility for decisions and actions made at the individual level.
- Maintains a positive team environment by cooperating willingly with other employees who request assistance and requesting assistance also if needed.

- Perform other duties as assigned.

QUALIFICATIONS:

- Two years of related experience or equivalent.
- Demonstrated ability to motivate and influence others in a positive way.
- Commitment to excellence and high standards
- Excellent math skills
- Ability to work with all levels of management.
- Strong organizational, problem-solving, and analytical skills
- Strong professional oral and written communication skills
- Ability to manage priorities and workflow.
- Versatility, flexibility, and a willingness to work within a constantly changing environment with enthusiasm
- Proven leadership and business acumen skills
- Strong interpersonal skills and thoroughness.
- Looks for ways to improve and promote quality.
- Applies feedback to improve performance; Monitors own work to ensure quality.

Education	High School Diploma. College Degree preferred.
Additional Comments	Two years of related experience required.
Credit Union	Pinnacle Credit Union
State	Georgia
Contact Name	Tarwana Lowe-West
Email	tarwanal@pinnaclecu.org
Phone	404-888-1648
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Expiration Date	06/30/2023