

Job Title

Member Success Manager

Short Description

RadiFi Credit Union (formerly known as Jax Federal Credit Union) is seeking a Member Success Manager to be responsible for the directing and administering the sales, service and operational efforts of a retail branch ensuring the branch meets organizational growth, sales, and service goals. Responsible for generating new revenue opportunities in and around the existing branch market. Ensures established policies and procedures are followed. Oversees the full range of services to members and prospective members. Through targeted sales goals, works to deepen existing relationships with members and new members.

Promotes service delivery excellence and actively coaches associates to deliver “awesome” service. Responsible for successful implementation of promotional campaigns and product initiatives at the branch level. Actively participates in community and business development initiatives, and monitors branch performance to ensure the branch meets organizational growth and service goals.

Full Description

RadiFi Credit Union (formerly known as Jax Federal Credit Union) is seeking a Member Success Manager to be responsible for the directing and administering the sales, service and operational efforts of a retail branch ensuring the branch meets organizational growth, sales, and service goals. Responsible for generating new revenue opportunities in and around the existing branch market. Ensures established policies and procedures are followed. Oversees the full range of services to members and prospective members. Through targeted sales goals, works to deepen existing relationships with members and new members.

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Major Duties and Responsibilities:

Acts as the branch “business owner” to enhance bottom-line performance through business development, and increasing revenue through sales, service and relationship building; along with controlling expenses and improving efficiency of the branch.

Coaches staff on their sales and service skills to motivate others in striving to achieve goals, adhering and executing on the Credit Unions "Awesome Sales & Service Program." Develops employees' skills in the Credit Union's preferred way of selling, coaches on sales strategies and tactics, professionally handles non-performance, and conducts effective 1-1 sessions.

Conducts quality, weekly sales meetings and huddles to discuss goals and action plans to meet monthly branch assigned goals. Takes proactive action to influence retail behaviors events or to achieve goals. Ensures adherence to Organizational Service Standards and effective execution of Retail Behaviors.

Generates new revenue opportunities for the branch by providing guidance on potential new products or solutions based on member and consumer feedback; along with controlling branch expenses to increase its overall profitability.

Achieves monthly/annual branch loan, deposit, and membership goals through the development and execution of Quarterly Action Planning and an individualized sales plans.

Work with Business Services Department to manage and develop local commercial business market. Delivers commercial credit union products and services within an assigned market. Responsible for meeting assigned commercial lending goals in addition to assigned branch goals.

Works to maintain and enhance Credit Union reputation with members, prospects, referral sources, and community-based organizations.

Assists in driving the success of other business lines in the credit union that rely on referrals to grow such as Investment Services, Business Services, and Mortgages. Responsible for overall branch performance in referral results.

Refers sales opportunities to other departments or Credit Union affiliates in support of established corporate objectives.

Obtains all needed information for a commercial loan request through member interviews, site visits, financial information, and third-party references.

Maintains knowledge of credit union products and services, as well as knowledge of the industries or market areas served. Keeps abreast of current developments and market trends, to further identify and service member needs, including commercial needs.

Participates in community events, represents the branch at sponsored events to promote RadiFi Credit Union in and around the branch community. Performs weekly business development activities to increase and grow the branch membership base.

Advocates for and advances the digital readiness of branch staff to increase adoption and utilization of the Credit Union's digital services among the team and membership.

Completes orientation of new employees in overall branch procedures. Appraise performance and provide recommendations for staff compensation, promotion, and termination as appropriate. Hold branch staff accountable to performance objectives and Retail Sales & Service expectations.

Works with Retail Leaders such as Regional Member Success Manager, VP of Retail Sales & Service, Sr Director of Operations, etc. to design and implement new sales strategies and overall operational efficiency ideas.

Assists in managing the overall recruiting and hiring process through participation in the selection of candidates to build future branch leaders. Participates in job fairs and career events with HR.

Work with HR and Retail Leaders to interview, hire and onboard new associates. Support the ongoing training & development of associates by directing job assignments, monitoring staff performance, coaching, counseling, training, assuring compliance with regulatory requirements. Must comply with all company policies and procedures, applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

Knowledge and Skills

Experience:

Minimum of five years of similar or related experience, including time spent in preparatory positions. Proven leadership experience with a sales & service focus with financial services industry experience preferred.

Education/Certifications/Licenses:

A high school degree or GED is required. College degree preferred in business, finance, accounting, or a related field. Must obtain and maintain NMLS certification and needed insurance licenses.

Interpersonal Skills:

A significant level of trust and diplomacy is required to be an effective subject matter expert in the position. In-depth dialogues, conversations and explanations with customers, direct and indirect reports, and outside vendors of a sensitive and/or highly confidential nature is a normal part of the day-to-day experience. Communications can involve

motivating, influencing, educating and/or advising others on matters of significance.

Other Skills:

Excellent communication, problem solving, and decision-making skills to effectively resolve member and employee issues. Balance team and individual responsibilities. Strong supervisory and leadership skills required to manage, motivate, and develop employees. Uphold confidentiality and customer privacy in all situations. Proactively seeks solutions that benefit the member and the Credit Union while exhibiting sound and accurate judgment. The ability to work independently and the ability to work within a team is required. Ability to use the Internet, Outlook, word processing and spreadsheet software and position specific software as required. Strong technology skills are desired. Ability to interact effectively with clients and other internal departments is required. Strong attention to detail is required.

ADA Requirements

Physical Requirements:

Is able to bend, sit, and stand in order to perform primarily sedentary work with limited physical exertion and occasional lifting of up to 25 lbs. Must be capable of climbing / descending stairs in an emergency situation. Must be able to operate routine office equipment including computer terminals and keyboards, telephones, copiers, facsimiles, and calculators. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours or travel off site whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Working Conditions:

Must be able to routinely perform work indoors in climate-controlled shared work area with moderate noise.

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.

Acknowledgment

Nothing in the 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 constructed as a guarantee of employment for any 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. College degree preferred in business, finance, accounting, or a related field.
Additional Comments	Apply online by visiting: https://www.radificu.org/careers/
Credit Union	RadiFi Credit Union
State	Florida
Contact Name	Aimee Haga
Email	ahaga@radificu.org
Phone	904-475-8023
Fax	904-350-9356
Expiration Date	04/30/2023