

Job Title

Member Success Supervisor

Short Description

RadiFi Credit Union (formerly Jax Federal Credit Union) is seeking a Member Success Supervisor to be responsible for supporting the Member Success Manager in meeting team and individual goals. May support Manager by assisting with coaching the branch team to effectively execute on Awesome Sales & Service Program and Retail Behaviors. Act as the Member Success Manager when the manager is out of the office attending business development events or on vacation.

Full Description

RadiFi Credit Union (formerly Jax Federal Credit Union) is seeking a Member Success Supervisor to be responsible for supporting the Member Success Manager in meeting team and individual goals. May support Manager by assisting with coaching the branch team to effectively execute on Awesome Sales & Service Program and Retail Behaviors. Act as the Member Success Manager when the manager is out of the office attending business development events or on vacation.

Location: to be determined

Major Duties and Responsibilities:

Interviews members and potential members and presents RadiFi Credit Union products and services that meet the needs of the members financial success.

Oversee Member Success Advocate operations to assure proper compliance is being followed in cash management.

Be a mentor for all Member Success Advocate levels in cross selling techniques and applying RadiFi service and sales standards. Model required behaviors in every interaction with the member.

Assist in providing training and coaching as needed to help the branch achieve it's strategic growth and assist in developing the branch's strategic growth plan. This includes the coaching of the Member Success Advocates to assure they are meeting assigned cross sell goals.

Attend outside business development and sales events with the Retail Leadership as assigned.

Act as a Member Success Lead in the absence of that position. May be asked to assist at other branches in this capacity in the event these positions are vacant or an extended period of absence.

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

Assist with member inquiries and escalations regarding debit card items, debit card fraud and dispute requests, stop payment requests, unauthorized ACH requests, statement review, member balancing assistance, deposit product rate review, name record file maintenance items, online banking items, and IRA withdrawals and maintenance.

Open new membership accounts to include consumer and business memberships.

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

Assist in the growth of business lines that require referrals to grow such as Investment Services, Mortgages, and Business Services. Meet assigned referral goals and assure Member Success Advocate staff is meeting assigned goals. Be an expert in all of our online product offerings, assisting members with the creation and maintenance of their online profiles.

Have the ability to solve complicated issues by providing first level problem solving skills.

Act as the branch subject matter expert on all loan and deposit products.

Process and close all loan applications to include consumer loans, VISA credit cards, and Home Equity loans.

Assign with outbound calling campaigns, monitor effectiveness and participate in calling efforts.

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

May be responsible for opening and closing of safe deposit box if branch location offer this service.

Act as a branch notary for members.

Attend meetings, training sessions and other assigned duties.

Knowledge and Skills

Experience:

Minimum of two years of similar or related experience, including time spent in preparatory positions. Must maintain your NMLS license and any insurance license required.

Education/Certifications/Licenses:

A high school degree or GED is required. College degree preferred.

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 50 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 complete basic mathematical calculations, spell accurately, and understand computer basics. 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.

Additional Comments

Credit Union RadiFi Credit Union

State Florida

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