

## Position Description

|                                     |  |
|-------------------------------------|--|
| <b>Position Title</b>               | Member Relationship Consultant – Retail Branch |
| <b>Department / Branch</b>          | Retail Branch                                  |
| <b>Reporting Relationships</b>      | Retail Branch Manager                          |
| <b>Supervisory responsibilities</b> | Nil  |
| <b>Classification</b>               | Banking Finance and Insurance Award            |
| <b>Effective date</b>               | July 2024                                      |

### **Objective of the Role**

The role is responsible for managing member relationships and providing high levels of customer service and an excellent member experience for members in the retail branch environment. Accountable for new business generation, conversion of portfolio activities to outcomes, member retention and satisfaction.

### **General Responsibilities of Role**

- Reporting to the Retail Branch Manager, the responsibilities of this role include but are not limited to the following:
- Provide an exceptional standard of member service leveraging your excellent communication and listening skills in alignment with our brand and values.
- Adhere to and exceed quality assurance standards with a consistent high level of service whilst complying with policies and procedures within the Retail Branch environment
- Proactively develop and maintain a strong knowledge of products, services, processes and digital systems provided by Credit Union SA.
- Establish and enhance relationships with existing and potential to identify opportunities to meet members' needs.
- Deepen Member relationships by exploring opportunities for other Credit Union SA products and services.
- Ensure all Members' needs are completed and recorded in required CRM in a timely, accurate and professional manner at the end of each interaction
- Ensure a clear understanding of call and digital communication standards and service level requirements
- Lodge and where able to resolve any Member or non-member feedback in a timely and professional manner within Credit Union SA policy and legislative requirements.
- Assume responsibility of own targets, setting strategies to meet them by working closely with Manager/Leader to develop coaching and action plans.

## Position Description

- Increase Members' knowledge of their membership through provision of information relating to Credit Union SA's products and services consistent with values of cross-sell and up-sell retention targets.
- Follow up Members in a timely manner through all distribution channels and proactively assess their needs to enhance their membership with Credit Union SA.

### **Other Job Related Information**

The role requires taking ownership of day to day operational processes and ensure compliance with policy, procedures and legislative requirements.

Success will rely on working collaboratively and contributing to building a supportive and high performance environment.

### **Key Selection Criteria**

#### **Essential:**

- Positive, proactive and results focused attitude and behaviour.
- High level of energy and enthusiasm, with a passion for excellence.
- Ability to create and build member relationships through curiosity and rapport building ensuring needs are identified and met
- Communication, Listening & Questioning Skills
- Customer/Member Service Skills
- Problem Solving Skills
- Negotiation/Conflict Resolution Skills
- Time Management Skills
- Ability to demonstrate high levels of data entry and minimal error rate.
- Attention to detail
- Identify & prioritise opportunities
- Ability to link product service and benefits to member needs
- Questioning and listening skills
- Clear and precise communication skills
- Questioning skills
- Closing – Assertiveness, urgency, negotiation
- Demonstrate empathy when dealing with members and internal stakeholders
- Influencing skills

#### **Desirable:**

- Demonstrated sales and service experience in a financial services, hospitality or retail environment.