

POSITION DESCRIPTION

TITLE: Business Development Representative

STATUS: Non-Exempt

REPORTS TO: Assigned Department Manager

SUPERVISES: None

Position Summary

The FSR/Business Development is accountable for building long term relationships with our member's in-person, on-line and by-phone to ensure member satisfaction and quality service by accurately and efficiently processing transactions and educating members with new products and services. In conjunction with the credit union objectives, this position will provide information and member support concerning the credit union and its products and services to credit union members, ensuring the highest quality of member service.

Duties and Responsibilities

Make business development calls to maintain existing business relationships. Make calls on educational institutions, non-profit organizations, businesses, auto dealers, real estate companies and builders to explain new loan products or promotions. Participate in area community organizations and represent the credit union at appropriate functions, meetings and professional associations to promote credit union products and services.

Serve the membership by providing service and information in a pleasant, professional and efficient manner via internet, telephone, in-person or written correspondence. Monitor all member service voice mail and reply accordingly.

Open and close accounts, verify accounts, accept loan applications, process various member transactions, and respond to member product and service inquiries. Accurately and efficiently process account opening on the system and collect documents needed for membership.

Assist in the maintenance of the database, correspondence, and direct marketing programs for the credit union. Track contact, marketing, and production results and generate monthly reports for management.

Cross-sell and upsell credit union products and services based on consumer needs and explain various account and ownership options.

Provide members with information or route calls to the appropriate area.

Research and solve member questions, problems, and complaints regarding their account either by telephone, written correspondence or in person. Transact business or refer members to the appropriate staff.

Provide need based recommendations to members to meet and exceed their financial expectations.

Provide members a trusting experience to build long term relationship and offer excellent service.

Respond to members in a timely and professional manner using the best communication channels.

Build reports and present to management based on the business need.

Participate in on-site presentations and banking programs with the assistance of credit union staff at various locations. Assist in the ordering and delivery of sales collateral to designated locations.

Educate staff on new product, service and system updates.

Any other duties assigned by management.

Skills, Abilities and Qualities:

Three to five years of progressively responsible experience in a financial institution or an acceptable combination of education and experience necessary to gain the background knowledge to transact business effectively with members and co-workers.