

Position: Member Services Representative I / Teller	Date: 06/08/2022
Department: Operations	Status: Non-Exempt
Reports To: Branch Manager	Shift: Weekdays 830am-5pm and Saturday 9am-1pm (rotation)
Supervises: None	Location: Owatonna   Faribault   Northfield

At HomeTown Credit Union, we make a difference for our staff, members, and the community by living out our Core Values of Integrity, Commitment, Member Advocacy, Education and Community. We encourage employee engagement in their careers and offer a competitive wage and benefits package. This position fills weekday hours and may include some Saturdays and/or holidays.

### **Job Responsibilities**

Act as the primary point of contact for members and provide excellent banking services in a professional courteous manner. Support the Credit Union's member centric environment by acting as a liaison between members and other Credit Union staff. Strengthen the Credit Union brand/image by consistently conducting yourself in a professional, friendly, and positive manner.

### **Essential Duties & Responsibilities**

- Confidentiality of member information is required.
- Process member transactions in an efficient and accurate manner while adhering to Credit Union policies and procedures.
- Maintain an ongoing knowledge of the member services platform such as transactions, account maintenance, online services support, etc.
- Balance personal cash drawer/cash dispenser within cash policy guidelines.
- Assist in balancing the vault and verifying cash deliveries.
- Assist in performing branch opening and closing procedures.
- Assist with daily check processing duties.
- Handle member inquiries and direct inquiries to other staff as appropriate.
- Project a positive and professional image, which includes being courteous and neat in appearance.
- Communicate professionally both verbally as well as in writing with all members and co-workers.
- Project warmth and competence both in person and over the phone.
- Work in an environment that demands resourcefulness and flexibility.
- Be knowledgeable of and adhere to all Credit Union policies and procedures.
- Perform other duties as assigned.

### **Additional Duties & Responsibilities**

- Using the Credit Union "Service Standards" as a foundation, demonstrate ongoing commitment to exceptional member service.
- Cooperate with Credit Union staff members to ensure a "team effort" and prompt member service.
- Be able to project a positive, professional image, which includes being courteous and neat in appearance.
- Must maintain regular and punctual attendance to required shifts, meetings, trainings, and related employment engagements to support position responsibilities and duties.
- Any alterations to required schedule must be reviewed and approved, in advance by your manager.

- Conduct business always with the highest standards of personal, professional, and ethical conduct.
- Perform or assist with any operations as required to maintain workflow and to meet schedules. Notify manager of unusual equipment or operating problems and the need for additional material and supplies.
- May participate in any variety of meetings and work groups to integrate activities, communicate issues, obtain approvals, resolve problems, and maintain specified level of knowledge pertaining to new developments, requirements, policies, and regulatory guidelines.
- Ensure all safety precautions are followed while performing the work.
- Follow all policies and Standard Operating Procedures as instructed by Management.
- Perform any range of special projects, tasks and other related duties as assigned.

## **Education & Experience**

- High school diploma or GED
- 1 year of customer service experience
- Proficient with Microsoft Office (Outlook, Word, Excel, etc.)
- 1 year of related work experience preferred
- 1 year Credit Union or Banking experience preferred.

## **Knowledge, Skills & Abilities**

- Understanding the Credit Union service industry
- Excellent customer service skills
- Collaborative attitude and team player
- Ability to learn new computer software and become proficient
- Handle change in a positive manner
- Ability to work in an environment of urgency, which demands flexibility and on-the-spot sound decision making.
- Ability to get along with others in stressful, high-pressure situations while maintaining a business-like composure.
- The ability to work independently, utilizing analytical skills, organizational techniques, and the effective use of time management.
- Ability to actively listen by giving full attention to what other people are saying, taking time to understand the points being made, and asking appropriate questions.
- Ability to communicate effectively via phone, email, MS Teams, etc.
- Detail orientated with the ability to multi-task, prioritize activities and manage change.
- Excellent communication skills, including listening, writing and presentation.
- Be self-motivated and demonstrate a desire for self-improvement.

## **Tools & Equipment Used**

- Computer, keyboard, mouse, copiers/printer, scanner, fax, postage/folding machine, etc.

## Physical Requirements / Working Environment

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- Sitting or standing at a workstation for extended periods of time (i.e., 4, 6 or 8 hours)
- Working on a computer throughout the day (monitor, keyboard, and mouse use)
- Ability to listen and focus for long periods of time
- Standing at a copier for extended periods of time
- Ability to lift up to 30 lbs.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Hours over and above normal office hours could occur, including evenings, holidays, and some weekends. Schedule is subject to change based on business needs.

## Disclaimer

*The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job. This is not an all-inclusive job description; therefore, management has the right to assign or reassign schedules, duties, and responsibilities to this job at any time.*

**I acknowledge that I have read this document and that it was discussed with me today. I understand the contents and acknowledge that I received a copy.**

## EMPLOYEE:

_____	_____	_____
Print name	Signature	Date

## SUPERVISOR:

_____	_____	_____
Print name	Signature	Date