

Position Title: Member Service Assistant (MSA)

Reports to: Branch Member Service Manager

Category: Non-Exempt

Status: Regular Full-Time

Position summary:

A Member Service Assistant plays an important role in our members banking experience. Most important is the ability to resolve member inquiries quickly and efficiently, delivering an extraordinary member experience all while managing the traffic flow in the branch. A Member Service Assistant must be adaptable, tech savvy and have a growth mindset, in addition to being member-fixated, be a positive, infectious contact between the public and the credit union.

Tasks:

Responsibilities include, but are not limited to the following:

- Oversees the lobby area, gives pleasant greeting to members, and other visitors, as they enter and leave the credit union.
- Prescreens all visitors requesting service to determine the purpose of the visit so that requests may be handled in the most efficient and effective manner possible. Directs/announces them to the appropriate individuals, as necessary.
- Reduce member financial concern by helping to determine both personal and business financial needs. Pull in experts (MSMs) that can help guide members to their financial solutions.
- Must be tech savvy. Showcases our products and how to easily navigate our mobile and online experience, using the branch laptops and iPads. Take an active role in educating members on other banking channels as well as other products and services.
- Keeps lobby and Smart Offices stocked with brochures, paper, pens, etc.
- Provides informed answers to members' questions on credit union products and services. Routine requests are handled at reception desk, if traffic allows. New accounts, or services that cannot be handled at the front desk, should be referred to an MSM or Smart Office as appropriate.
- Understands ETM functions and advocates its use; encourages members who require teller services to utilize ETM whenever possible.
- Understands Smart Office functions and advocates its use; provides support to members as well as Back Office staff, as appropriate, when Smart Office is in use.
- Will be readily available via headset to assist the Lending Department or Smart Office MSM with members who are in the Smart Offices.
- Research and answer member inquiries with the intent of enhancing member retention and engagement by leveraging various tools and channels to recommend appropriate solutions.
- Performs a variety of transactions while monitoring fraud mitigation and adhering to established operational policies and procedures.
- Assists MSM with branch opening and closing procedures
- Performs other duties as assigned.



Basic Qualifications:

- High school education and at least two year's work experience of a clerical nature.
- Familiarity with Microsoft Office applications.
- Pleasant outgoing personality which gives a positive image of the credit union to members and prospects.
- Good verbal, written, and telephone communication skills.
- Professionalism in dealing with members, managers and co-workers. Ability to maintain composure under pressure.
- Standing on feet for the majority of the 8 hour day.

Preferred Skills/Experience:

- Thorough knowledge of TFCU's products and service.
- College level courses.

Employee's Signature

Date

Manager's Signature

Date