

Position Title: Member Service Manager
Reports to: Branch Operations Supervisor
Category: Non-Exempt
Status: Regular Full-Time

Position summary:

The ultimate role of a Member Service Manager is to ensure success for Tidemark FCU by providing excellent member service and to determine ways to improve the profitability, productivity and growth of the assigned branch.

Tasks:

Responsibilities include, but are not limited to the following:

The following is in addition to the tasks required of a Member Service Representative.

- This is a semi-professional level position, defined as:
 - The ability to use independent judgment and discretion in performing work duties.
 - Some authority for decision-making.
 - In-depth work requirements, such as data gathering, analysis and interpretation.
 - Individual accountability for results.
- A Member Service Manager is expected to take the lead in a difficult or problem situation and assist branch staff as needed.
- The Member Service Manager will primarily work at their assigned branch or member service but may be called upon from time to time to work in other branches as needed.
- Provide a higher level of expertise on a temporary basis to another branch or the Member Service Center.
- Responsible for the efficient and effective management of the branch.
- Manages branch to insure effective performance and accomplishment of branch financial objectives, goals and productivity standards.
- Oversees MSA duties and responsibilities to ensure a positive and productive experience for members.
- Conducts performance reviews for MSA as needed (30-day, 60-day, 90-day and annually).
- Conducts monthly security branch audit and compiles reports to be uploaded to W:drive.
- Attends all necessary meetings, trainings and planning sessions.
- Provide OTJ training to new or less experienced staff.
- Ensures that the branch is open and ready to conduct business each day.
- Responsible for inventory and supplies for branch, including record keeping and ordering.
- Assist members as needed at the ETM.
- Perform teller functions within the branch as needed.
- Responsible for accurately conducting all credit and debit transactions in compliance with established credit union policies and procedures including accepting deposits and loan payments, verifying cash and endorsements, cashing checks within limits and obtaining further authorization when necessary, processing cashier's checks, and cash advances.
- Prepare individual and branch totals daily to ensure that the branch is balanced.
- Process member requests for opening accounts, account updates, check orders, card orders, statements, account closures, and loans in a professional and courteous manner.

- Answer telephone inquiries using proper phone etiquette, taking clear concise messages, handling member inquiries directly in a prompt professional manner, or where appropriate, ensuring the inquiry is directed to the appropriate department or staff member. Fosters a positive image of Tidemark Federal Credit Union via professional representation in all contacts.
- Expected to discuss and take mortgage and construction loan applications in branch or assist with any Smart Office communication.
- Maintains a thorough knowledge of Tidemark FCU products, services, policies, and procedures and provides excellent member service in accordance with Tidemark FCU's core values and service initiatives.
- Ensure compliance with internal controls, operational procedures and risk management policies.
- Ensures that established policies and procedures are adhered to and that the members are served promptly and professionally.
- Effectively identifies the financial needs of our members; integrates products/services with members' needs; and successfully cross sells these products/services based on the Consultative Sales Approach
- Develop new and strengthen/expand existing personal and business client relationships through daily member relationship management, providing financial solutions that meet members' needs and goals, penetrating all product and service lines.
- Maintains a thorough understanding of branch financials and how they pertain to the success of the assigned branch.
- Performs other duties as assigned.

Basic Qualifications:

In addition to the qualifications needed for the MSR position, the MSM must have the following qualifications:

- A minimum of 2 years of experience as an MSR.
- You must consistently Exceed Standards on your monthly branch financials.
- You must have excellent member service skills, display confidence, and command respect.
- You must be self-motivated, responsible in your work ethic, disciplined, and accountable.
- You must receive a written recommendation from the Member Experience Manager following a review of your employment history and an independent assessment of your performance on the job.
- You must successfully pass testing requirements.
- You must qualify for a National Mortgage Licensing Services (NMLS) license (this requires a background check and fingerprints).

Preferred Skills/Experience:

- Strong analytical skills necessary to evaluate credit requests, prepare budgets, and determine trends in each marketplace.
- Thorough knowledge of Tidemark FCU's products and service.
- Thorough knowledge of regulatory, policy and compliance issues.

X _____
Employee Signature

Date

Branch Member Service Manager



Reviewed October 2020

X _____
Manager Signature

Date