

Member Connections Specialist I

City & County Credit Union

Classification: Non-Exempt

Reports to: Member Connections Manager

Review Date: September 2025

JOB DESCRIPTION

The Member Connections Specialist (MCS) interacts with all areas of the credit union. The primary responsibility is providing member service and engagement through phone calls and electronic forms of communication. The MCS answers a wide variety of member questions, handles member requests, performs transactions, and provides information on credit union services and products and service channels.

Essential Functions:

- Serve members by providing service and information in a pleasant, professional, and efficient manner via telephone and electronic services, i.e. Live Chat, Email.
- Accurately process member transaction and service requests.
- Assist and educate members with selecting the products and services that best meet their needs and recommend other complementary services to provide member satisfaction, increase product penetration, and promote the credit union.
- Provide timely responses for account inquiries, member questions and member research requests.
- Conduct follow-up and outbound calls to members/potential members in a professional and timely manner.
- Maintain and apply a comprehensive knowledge and understanding of all credit union products, services, policies, and procedures.
- Contribute effectively to personal/individual, department and organizational goals.
- Possess a basic understanding of financial institution regulations and how they apply to the credit union.
- Exercise discretion, judgment, and initiative regarding transaction problems and inquiries.
- Maintain confidentiality of member account information. Follow established policies and procedures in responding to inquiries and requests.
- Contribute to a positive working environment by acting as a team player with in the branch and the credit union as a whole.
- Maintain a clean, organized workstation.
- Research and resolve discrepancies for self, and assist others. Report any discrepancies to the supervisor as necessary.
- Assist all areas of the Credit Union as needed.
- Establish new member relationships by following procedures and established qualification guidelines.
- Analyze account opening documentation to best determine membership and account options available and adhere to risk mitigation procedures.
- Conduct initial loan interview on consumer lending products. Begin loan process in operating system.
- Analyze credit report to identify financial needs and educate the member on our products and services to best help them with their needs.
- Follow Bank Secrecy Act (BSA) policies and procedures as they relate to this position.
- Other responsibilities as assigned.

Business Development

- Proactively networks both internally and externally to build referral sources to drive in additional business.
- Initiates and conducts business development efforts through both individual and joint department presentations to prospects. This includes Community Development activities establishing through the Marketing Department.
- Actively participates in department sales and product knowledge meetings.

Competencies & Skills:

- Team player who is a self-starter who shows maturity, confidentiality and adaptability.
- Learning agility.
- Strong time management skills.
- Ability to handle multiple projects simultaneously and work with regular and changing deadlines.
- Display professional image and show respect for and patience with those different from themselves.
- High attention to detail, accuracy and thoroughness.
- Ability to communicate complex information in a clear, concise and professional manner to a wide variety of audiences.
- Excellent organizational and verbal, as well as, written communication skills.

Qualifications:

- High School degree required with Associates or bachelor's degree preferred.
- 0 to 2 years' prior credit union/banking or call center experience
- Proven superior customer/member service skills including ability to cross-sell services and products.

Other Requirements

The call center fields many calls related to electronic channels including home banking, mobile banking and loan applications. The marketing and IT department provide tips and workarounds when there are known platform issues. The ideal representative should have some comfort with various IT terminology and helping others troubleshoot issues.

Supervisory Responsibility: This job has no supervisory responsibilities.

Work Environment:

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers and phones.

Physical Demands:

Continuous sitting. Occasional walking. Occasional standing. Occasional lifting up to 20 pounds. Occasional bending and/or reaching for supplies on ground level. Occasional reaching above shoulder level for supplies overhead. Frequent repetitive use of hands such as simple grasping, twisting/turning of wrists, and finger dexterity to perform various accounting duties such as using a 10 key calculator, keyboarding and entering data into the computer system. Frequent speaking, listen and hearing for interaction with members, staff, and the general public. Occasional clarity of vision at 20 inches or less. Frequent clarity of vision at 20 feet or more.

Expected Hours of Work:

Longer hours, evenings and weekend work may be necessary.

Travel: This position requires 10% travel to provide department coverage and for in-person training sessions.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.