



COMMUNITY CREDIT UNION of FLORIDA
Position Description
Select Employee Group (“SEG”) Relationship Manager

Reports to: VP Marketing
Department: Marketing

Grade: 9
Job Group: Non-exempt

The primary purpose of this position is to assist Community Credit Union of Florida (“CCU”) in living out our Mission, “*Always improve the financial well-being of our members and make a positive difference in our community,*” by delivering outstanding service to both internal and external members. A key element of excellent service is to identify the financial needs of each member and recommend an appropriate credit union solution. In addition, the SEG Relationship Manager is responsible for supporting the development of relationships with both employers and employer groups in order to promote CCU products and services, and acquire and retain members. Serve as point of contact for current and potential SEGs, for the purpose of developing and maintaining relationships, in both public and private companies. Flexibility in work schedule with ability to work non-traditional hours, is necessary in order to accomplish various tasks.

ESSENTIAL DUTIES

- 1) Demonstrates enthusiastic support of corporate mission, core values and long term objectives by performing job duties within our bylaws, regulations, Board of Directors policies, established internal and external service standards and our work procedures while possessing adequate product knowledge as measured by the annual product knowledge assessment.
- 2) Delivers service to both internal and external members that is in alignment with the credit union’s Service Promises, and meets all established service goals as measured by the Internal Service Survey.
- 3) Abides by CCU’s Service Promises when helping a member or co-worker to ensure timely responsiveness to the individual’s needs. Promotes teamwork, respects opinions, abilities and contributions of others and conveys a willingness to assist and cooperate with others for the benefit of the organization.
- 4) Assists in attaining established departmental goals and adhering to all credit union standard operating policies and procedures, as well as state and federal regulations and guidelines. Responsible for accurately completing daily task activities and entering data in timely manner to ensure 70-80% engagement metric is met.
- 5) Manage current SEG relationships via on-site visits, enrollment sessions, financial workshops, presentations, consistent communication, etc. to increase awareness and membership penetration, including providing members with information on deposit accounts and loan features, along with opening accounts and cross selling products.
- 6) Engages in SEG development activities and solicitation of new market prospects for segmentation growth and development to increase market penetration. Formulates strategies for developing existing markets and opening new markets. Conducts presentations to promote CCU membership, products and services, including providing information on deposit accounts and loan features, along with opening accounts and cross selling products.
- 7) Participate in periodic events and sponsorships within the area representing the credit union, including public speaking, to promote knowledge of the credit union’s products and services. Stay actively involved in Chamber of Commerce and other organizations to maintain a strong community presence.

- 8) Assists with back office and branch support by responding to member inquiries and problems in a professional, timely manner; follows up on inquiries with informational materials and/or contact by phone, email and/or text; investigates and corrects errors and resolves problems or other issues; helps members to utilize electronic delivery channels for convenience.
- 9) Prepares detailed, timely and accurate reporting periodically on SEG development activities. Extracts data to prepare meaningful, user-friendly, operational reports. Identifies deficiencies in data quality and works to resolve problem areas. Prepares a variety of routine and special reports as required.
- 10) Works with Marketing Department to develop marketing and promotional activities/opportunities, including media relations. Participates and helps set up external and internal credit union marketing promotions and functions such as grand openings, annual meetings, shred days, member educational training, tabletops, staff meetings, etc.
- 11) Establish, coordinate, and present training/orientation materials and programs for credit union, business, community, and school participants, and make presentations to local business organizations including Chamber of Commerce, professional associations, and service associations.
- 12) Establish project plan and schedule to create and maintain relationships with targeted groups. Monitor potential changes to project scope/direction, progress towards key deliverables and milestones, identify potential problems and work with the VP of Marketing to take corrective action.
- 13) Collects pertinent information of potential members to determine whether they meet the membership criteria to comply with the Bank Secrecy Act/USA Patriot Act Customer Identification Program. Prepares all documents and items pertaining to accounts and processes according to policy and procedure.
- 14) Possesses a thorough knowledge of credit union policies, rates, and documents and disclosures necessary to ensure compliance and consistency with current regulations.
- 15) Maintains on-going communication with supervisor, informing individual of all pertinent problems, irregularities, new developments, changes and other important information within the department.
- 16) Performs other related duties as assigned and works on special projects as assigned.

ENVIRONMENT AND PHYSICAL ACTIVITY

The environment for this position is an open, non-confined office-type setting that is clean and comfortable where the incumbent is free to move about at will. It may include some minor annoyances such as noise, odors, drafts, and includes driving approximately 40% of the time as frequent travel to various SEGs/potential SEGs throughout the area is necessary.

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to spend time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception, and adjusted focus), sitting for long periods of time (up to 8 hours), pulling, walking, standing, squatting, kneeling, and reaching.

The incumbent for this position may operate any or all of the following: telephone, copy and fax machines, calculator, film equipment, typewriter, computer terminal, personal computer, and related printers.

MENTAL DEMANDS

The incumbent in this position must be able to read documents or instruments, perform detailed work and problem solve; possess excellent member contact and verbal and written communication skills; have strong math and analytical reasoning skills; and the ability to effectively handle stress, multiple concurrent tasks, and constant interruptions.

POSITION REQUIREMENTS

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- Associate's degree (AA) from college; or two (2) to five (5) years related experience and/or training; or equivalent combination of education and experience. Work related experience should consist of exceptional customer service experience with outside calling and sales background with an emphasis in the financial services industry. Educational experience, through in-house training sessions, formal school or financial industry related curriculum, should be business or financial industry.
- Demonstrated creativity with excellent presentation (oral and written) skills required; ability to adapt and communicate effectively with different demographic groups and individuals.
- Exceptional oral, written and interpersonal communication skills with the ability to apply common sense to carry out instructions and instruct others, read and interpret documents, understand procedures, write reports and correspondence, and speak clearly to customers and employees.
- Excellent organization and time management skills, with ability to multi-task, demonstrated ability in organization and delegation skills and be a strong team player. Ability to work with no supervision while performing duties.
- Advanced skills in personal computer operation, including word-processing, spreadsheet and data management software programs.
- Ability to create and implement solutions; use independent and discretionary judgment; organize information quickly and efficiently; research and analyze new and existing program concepts.
- Basic math skills; calculate interest and balance accounts; add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals; and locate routine mathematical errors.
- Current Florida driver's license and a vehicle with appropriate insurance coverage as required to drive in the course of performing assigned duties and responsibilities.

The incumbent must be able to perform this position safely, without endangering the health and safety to individual or others.

Management reserves the right to change this position description at any time according to business needs.

Review and Approval: Indicates review by incumbent and approval by supervisor.

Employee: _____

Date: _____

Supervisor: _____

Date: _____

Department Head: _____

Date: _____

Human Resource: _____

Date: _____