

EXTRA Credit Union
Member Services Coordinator

Department: Member Services
Reports To: Member Relationship Manager Classification: Non-Exempt

Role:

Maintain lobby traffic flow, anticipate and respond to member needs; direct traffic to appropriate individuals. Assist members with their consumer lending and Extra Credit Union needs; analyze loan requests and make credit recommendations based on Extra Credit Union's lending policy. Explain services, set up new accounts, respond to problems, and direct members to the appropriate people. Perform outbound calling and other sales-related duties.

Essential Functions & Responsibilities:

Maintain lobby flow by anticipating and responding to member needs. Direct lobby traffic to appropriate individuals; assist members with their requests; answer questions about our products and services and resolve problems that are within your authority to resolve. Refer questions that are beyond your authority to the appropriate team member or Supervisor for resolution.
Assist members with their requests regarding opening and closing new accounts, including performing account closures in the core system. Maintain a complete knowledge base of all products and services.
Identify cross-sell opportunities and cross-sell products and services to members.
Maintain appropriate records and prepare required reports. Perform front desk duties as assigned pertaining to member services, including conducting notary services for members. Handle all lobby front desk functions to ensure a professional image is maintained and communicated to internal and external members.
Explain loan programs to members and potential members. Evaluate member needs and recommend loan options.
Complete outbound calling on identified members from new accounts opened, onboarding and re-boarding campaigns.
Performs other duties as assigned.

Knowledge and Skills:

- Experience: One year to three years of similar or related experience.
- Education: A high school education or GED.
- Interpersonal Skills: Courtesy, tact, and diplomacy are essential elements of the job. Work involves personal contact with others inside and/or outside the organization, generally regarding routine matters for purposes of giving or obtaining information which may require some discussion. Professional appearance is required.
- Other Skills: Must have excellent interpersonal and communication skills. Must have above-average keyboarding skills. Must be proficient in Microsoft Office. Must be highly organized with attention to detail.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.