



## HORIZON FEDERAL CREDIT UNION POSITION DESCRIPTION

<b>POSITION DESCRIPTION:</b>	Member Engagement Representative
<b>REPORTING TO:</b>	Member Engagement Manager
<b>DEPARTMENT:</b>	Retail Banking
<b>FLSA STATUS:</b>	Non-Exempt
<b>SALARY RANGE:</b>	

Horizon understands our employees are the credit union's greatest asset. We recruit and develop enthusiastic, engaged, and empowered individuals to take ownership of each and every member experience to ensure the member is receiving exemplary service. Together, we strive to provide a brighter financial future for our staff, our members, and our surrounding communities.

***Our staff is driven by a common passion to be the BEST by doing whatever it takes to exceed the expectations of our members and internal team. They are determined to differentiate our Credit Union in the marketplace through our obsession for delivering superior quality and professionalism. They are collectively focused on conducting all business, internally and externally, with the highest degree of honesty, integrity, consistency and ethics.***

### POSITION OBJECTIVE

Responsible for delivering an exceptional member experience and expanding member relationships through non-branch delivery methods; including phone, email, video, and online chat. Providing exceptional service and interaction experience among your team members within your department and across Horizon is crucial.

### RESPONSIBILITIES

1. Serves as ambassador of the Horizon Federal Credit Union (Horizon) brand. Continuously demonstrates the Credit Union's mission, vision, and core values in all interactions with current and perspective members, colleagues, vendors, and community.
2. Performs remote banking transactions such as deposits, withdrawals, account openings, and inquiries accurately and efficiently, while educating members on use of Horizon's alternative delivery methods, when applicable.
3. Explains, promotes, and refers relevant products to meet the financial needs of each member and expand member relationships.
4. Maintains an up-to-date and comprehensive knowledge of all Horizon products and services, with a focus on member alternative delivery methods (online, mobile, telephone, chat, digital wallet, etc.); product knowledge, procedures, rules, and regulations, etc., and keeps abreast of any changes.
5. Assists with researching, resolving, troubleshooting, and communicating with any member's concern, issue, question, or feedback.
6. Processes mail transactions, including returned mail. Tracks bad addresses, when applicable.
7. Performs ODP fee refund requests for members, when applicable.

8. Provides exceptional service to current and perspective members, teammates, and all other points of contact.
9. Assists with researching, resolving, and communicating with members regarding issues and concerns involving card issues, orders/reorder, PIN reset, Reg. E claims, etc.
10. Communicates in person, over the phone, text, chat, video, and through email in a clear, diplomatic, and professional manner.
11. Utilizes digital tools (text, chat, video, etc.) to communicate with members to improve productivity, efficiency, and service.
12. Prevents controllable losses by strict adherence to security, compliance, and fraud & prevention policies and procedures.
13. Adheres to all policies and procedures described in the Employee Handbook.
14. Actively seeks solutions to member and team service complaints and escalates accordingly.
15. Supports the branch network by answering questions related to policy and procedure.
16. Assists with Beta testing for new and upgraded products, systems, and applications.
17. Regularly conducts outbound calling to cross-sell, up-sell, and further educate members on products, services, and current promotions.
18. Actively participates in internal and external educational programs, schools, or conferences to continually develop greater knowledge and expertise. Take initiative for personal career development and seek opportunities to learn new skills.
19. Completes annual mandatory compliance and other trainings.
20. Willingly participates in Credit Union functions, committees, and events on a volunteer basis or as reasonably requested.
21. Willing to work evenings and Saturdays as required.
22. Completes all other duties as assigned and/or required.

## QUALIFICATIONS

**Education and Experience:** High school diploma or equivalent.

**Other:**

- 6 months' minimum job proven banking experience.
- Thorough comprehension of credit union's products, services, policies, procedures, and regulations.
- Maintains a professional demeanor in appearance, communication, and action.
- Possesses a high level of interpersonal communication, both verbal and written.
- Well organized, ability to multi-task and move quickly between priorities.
- Effectively works and remains calm under pressure and in tense situations.
- Maintains confidentiality of all members and employees, their business dealings and transactions.
- Solid working knowledge of PC-based programs.
- Proficient with Horizon's Core Processor, New Account and database.

**Language Skills:**

Ability to read, analyze, and interpret financial reports and documents, periodicals, journals, reference resources, and training and policy manuals. Ability to comprehend and respond to common inquires or



**This is not to be construed as an employment contract.**

**This job description does not alter the Employment-AT-Will relationship in any way.**