

Family First of NY FCU

POSITION DESCRIPTION

POSITION TITLE: Relationship Development Officer

DEPARTMENT: Member Services

CLASSIFICATION: Non-Exempt

APPROVED BY: Deb Baker

RISK ROLE DESIGNATION:

REPORTING RELATIONSHIPS

POSITION REPORTS TO: Director of Member Services

POSITIONS SUPERVISED: N/A

POSITION PURPOSE

Responsible for planning, developing, and implementing sales and marketing activities to increase market share in assigned sales area. Promotes Credit Union products to existing and prospective accounts. Develops and maintains productive working relationships with members. Conducts sales calls to explain and demonstrate products and services and to obtain sales orders. Ensures members are well satisfied with products and services. Meets or exceeds goal expectations and ensures professional relations exist with sales contacts. Makes recommendations to management regarding product development, pricing, and sales projections. Ensures established policies and procedures are followed. Oversees the provision of a full range of services to members and prospective members. Ensures members are promptly and professionally served.

ESSENTIAL FUNCTIONS AND BASIC DUTIES

1. Assumes responsibility for the effective performance of area sales and development.
 - a. Prospects for new business opportunities to expand branch market share. Conducts regular sales calls to develop member relationships and follow up on leads. Makes sales presentations to prospective members as requested.
 - b. Collects information on competitor products. Develops sales points to highlight advantages and benefits of Credit Union products and services.
 - c. Tracks sales deals through closing and reports on weekly Sales Sheets.
 - d. Makes sales calls to existing members to ensure continued satisfaction with Credit Union products and services. Ensures sales accounts are serviced in accordance with Credit Union standards and policies.

- e. Responsible for branch business development and seeks to broaden member base. Actively cross sells Credit Union products and services to attain both individual and branch goals.
- f. Implements a call program that includes contacting existing members to maintain and expand banking relationships and contacting prospective members to develop new business.
- g. Attends community functions to promote credit union awareness.
- h. Becomes a member/Board Member of three (3) Organizations in the community.
- i. Meets or exceeds established quotas and sales goals.

2. **Assumes responsibility for helping our members when needed.**

- a. Ensures that any member's requests and questions are referred to the appropriate individuals.
- b. Ensures our members are informed of Credit Union services, products, and policies. Cross sells products and services. Actively sources new business and opportunities within the branch market. Works to source new business outside of the member base.
- c. Ensures the Credit Union's professional reputation is maintained.
- d. Demonstrates strong business development skills and helps drive new accounts and members to the Credit Union.
- e. Performs other job-related duties as assigned.

PERFORMANCE MEASUREMENTS

- 1. Branch services are efficiently and effectively delivered in accordance with established Credit Union policies and standards.
- 2. Good business relations exist with members and their questions and problems are promptly resolved.
- 3. Good working relations exist with branch personnel. Assistance is provided as needed.
- 4. Required reports and records are accurate and timely.
- 5. Management is appropriately informed of area activities and of any significant problems.
- 6. Individual and Branch goals are being met. Book of Business calls and outside calls are being completed.
- 7. Good business relations exist with members and their questions and problems are promptly resolved.

QUALIFICATIONS

EDUCATION/CERTIFICATION:	High school graduate or equivalent. Additional coursework preferred.
REQUIRED KNOWLEDGE:	Thorough knowledge of Credit Union products, services, and policies. Understanding of MSR and Financial Service Representative functions. Knowledge of Loan Officer underwriting. Proven sales experience for multiple years against established goals. Strong business development skills.
EXPERIENCE REQUIRED:	Two to five years of related business development experience required.
SKILLS/ABILITIES:	Strong interpersonal and communication skills. Well organized. Able to operate related computer applications and basic business equipment. Good marketing skills. Good supervisory abilities.

PHYSICAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION

REPETITIVE MOTION:	Movements frequently and regularly required using the wrists, hands, and/or fingers.
PHYSICAL STRENGTH:	Sedentary work; sitting most of the time. Exerts up to 10 lbs. of force occasionally. (Almost all office jobs.)

MENTAL ACTIVITIES AND REQUIREMENTS OF THIS POSITION

REASONING ABILITY:	Ability to apply logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions. Able to interpret a variety of technical instructions and can deal with multiple variables.
MATHEMATICS ABILITY:	Ability to compute discount, interest, profit, and loss; commission markup and selling price; and ratio, proportion, and percentage. Able to perform very simple algebra.
LANGUAGE ABILITY:	Ability to prepare business letters, proposals, summaries, and reports using prescribed format and conforming to all rules of punctuation, and grammar. Ability to conduct training and make professional presentations.

Family First is an equal-opportunity employer. The company's policy is not to discriminate against any applicant or employee, intern, volunteer, etc., based on race, color, sex, religion, national origin, age, disability, military status, genetic information, or any other basis protected by applicable federal, state or local laws.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodation will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.