

Role Profile

Member Service Representative (MSR)

Last Updated: July 2022

Reporting to the Manager, Member Service or Assistant Branch Manager, the Member Service Representative plays a key role in delivering a consistent and compelling member experience at ACU. The Member Service Representative supports members with their day to day transactions and digital banking, listens and asks questions to uncover members' unique needs, answers their inquiries, resolves concerns, and connects them to the team of experts across ACU. Often acting as the first point of contact for members in branch, the Member Service Representative contributes to the overall satisfaction and retention of ACU members.

KEY ACCOUNTABILITIES

- Provides a high level of service by attending to members in a courteous and professional manner, ensuring all advice and service delivery standards are met and exceeded at all times.
- Promotes, educates, and assists members with their digital banking needs.
- Provides transactional service to members including deposit processing, withdrawals, bill payments, cheque cashing, etc.
- Assists with opening and closing duties of the vault, ATM, and cash recycler units as required.
- Supports lobby management, greeting members warmly on arrival.
- Through discovery, identifies members' goals and needs and connects them to the right Advisor to serve their immediate and future needs in all interactions on the frontline and during lobby management.
- Achieves individual targets and collaborates to support team success, demonstrating service excellence and product knowledge.
- Resolves member complaints with an aim for first contact resolution and referring complex issues when needed.
- Observes and adheres to all credit union policies and procedures on internal control and risk management including security requirements for cash custody & safe guarding, frauds, forgeries and robbery procedures.
- Demonstrates understanding of ACU's commitment to values-based banking, respectful workplace, and Diversity, equity and inclusion.
- Maintains privacy, keeping strictly confidential member information that becomes available to them in the course of their duties.

QUALIFICATIONS

Education and experience

The competencies for this position would require a minimum grade twelve diploma, plus two to three years job related experience or an equivalent combination of education and experience.

Key Occupational Skills

- Cash handling experience including counting cash and balancing cash flows
- Excellent customer service experience and a strong team player
- Effective communication skills with a focus on building relationships
- Proven track record in completing tasks with high accuracy and attention to detail
- Effective problem solving skills with ability to prioritize and multitask
- Proven experience with various computer applications
- Knowledge of credit union products and services, policies and procedures is an asset

Additional requirements:

- Available to work branch hours including Saturdays at different locations within Winnipeg
- The MSR must be fluent in English both verbal and written.