



VantageOne
CREDIT UNION

Career Opportunity

External Advertisement EX 2021-40

December 13, 2021

Closing Date: Until Filled

Part Time Solutions Centre Representative

Vernon, Main Branch

This is a fantastic opportunity to utilize your customer service acumen, strong interpersonal skills, passion for sales and service, teamwork and commitment to delivering results.

About the role:

Using an enthusiastic approach, your goal is to help build relationships with members over the telephone, email video and web, providing excellent service delivery, and making appropriate recommendations for products and services to meet member needs. You will also act as an ambassador for our digital and self-service channels to provide members with a variety of ways to make banking with us easy and flexible. And, when appropriate, identify opportunities to refer members to internal specialists for a variety of needs including lending, investments, and wealth management.

Who We Are:

We are a locally owned and operated credit union dedicated to the financial well-being of our members, clients, employees, and communities. Part of what sets VantageOne apart from others is that while we offer traditional banking and borrowing solutions, we have also strategically diversified our services to meet our members' expanding financial needs by offering Financial Ability with a Human Touch.

Our history as a credit union reaches all the way back to 1944 when we opened our first branch in Vernon. Since that time, we're proud to have become a vital part of the local business economy. From the very start, we have seen ourselves as a local business, owned by our members and operated by people who live here and are deeply invested in our communities.

Please **email** a resume and cover letter to HR@vantageone.net

We welcome applications from all interested; however, only those selected for an interview will be contacted.

Learn More About

Life
At VantageOne



the *Application*
Process

www.vantageone.net

Job Description

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|---|---|
| POSITION TITLE: | Solutions Centre Representative |
| BUSINESS: UNIT/DEPARTMENT: | VantageOne Credit Union Solutions Centre |
| LOCATION: | Main Branch |
| REPORTS TO: | Solutions Centre Manager |

PURPOSE OF POSITION

The Solutions Centre Representative supports all VantageOne business lines by acting as the first point of contact for the organization and its subsidiaries; meeting, greeting and serving our public; developing new business opportunities through active promotion of the VantageOne Group of companies through outgoing call programs; and fostering partnerships by focusing on service excellence, service delivery and excellent product knowledge.

ROLES AND RESPONSIBILITIES

Sales and Service

- Provide superior sales and service support to ensure a positive rapport and ongoing relationship with members and prospects of VantageOne is established, maintained and enhanced.
- Answer Main Switch Board for all branches and subsidiaries; Identify needs and provide appropriate solutions by initiating transactions or by referring to appropriate business line, ensuring each department, subsidiary, and the member/caller has sufficient information to follow through with identified needs.
- Interact directly with members/callers via incoming and outgoing calls, live chat, video chat, social media, text, instant messaging, e mail or voice communications to market VantageOne products and services and connect the goals of our members to the products and services that will assist in their achievement of their goals and increase the financial literacy of our members.
- Proactively initiate conversation that will uncover opportunities to entice movement of business to VantageOne Credit Union and subsidiaries from other Financial Institutions, or begin savings and loan programs, initiate real estate referrals and take advantage of advanced financial counselling available through VOF.
- Participate in member onboarding process with follow up emails, letters and phone calls to ensure all members establish an active relationship with VantageOne Credit Union and subsidiaries.
- Assist members with technology, website, and product/service staff with process and procedure questions to enable them to maximize the use of all services and products, with an immediate response and/or a minimum turnaround of 24 hours on any complex issues; refer more complex issues to the Manager, if required.
- Schedule member appointments with staff through electronic scheduling system.
- Provide timely policy, process and task information to staff to solve procedural questions. Maintain a detailed log of all contacts, including a description of the reason for contact, action taken to resolve the issue, and the follow-up to be conducted, as applicable.
- Ensure issues are actively pursued until a satisfactory solution is found.
- Answer and resolve member/staff concern by clarifying issues; researching and exploring answers and alternative solutions; implementing solutions; escalating unresolved problems to the appropriate area for review.

- Track technical issues through current ticketing software systems
- Collaborate with various departments for the most effective and accurate responses to ensure continuity across all channels; and work closely with other departments to troubleshoot and resolve issues
- Follow process and procedural guidelines and quality assurance standards to address problems and concerns; suggest solutions, and drive positive outcomes resulting in an excellent experience for all who consult the Hub.
- Ensure all learning activities and other requirements are completed annually to maintain required knowledge and skill levels
- Electronic tracking of product sales and referrals

Non-cash transactions

- Processes member-initiated transactions
- Sends & receives wire transfers
- Opens; renews and reinvests investments products
- Opens new RRSP contracts and forwards to appropriate branch for signature
- Daily data entry of non-cash transactions on the banking system
- Complies with internal policy and procedures
- Adheres to relevant regulations and legislation, e.g. PIPEDA and Anti Money Laundering Legislation

Administration:

- Mail out credit union product and service information to members
- Assist with regular departmental administrative duties as assigned
- Electronic tracking of product sales and referrals
- Access Credit Card software site(s) for administrative purposes
- Review system generated reports for potential sales and service opportunities

Team

- Attend, participate and contribute to scheduled meetings as required
- Provide operational support to work team members

Other Duties as Assigned

EDUCATION & EXPERIENCE

Education:

- High School Diploma / Grade 12 and some additional courses, TLC and CUSource Skillssoft courses.

And

Job Related Experience:

- 1 – 3 years experience as a Teller/ Member Services Representative preferably with call centre experience and investment product knowledge

Or

- An equivalent combination of both education and experience acceptable to VantageOne.

SKILLS AND KNOWLEDGE

Accounting

Familiarity in the area of accounting as it applies to balancing daily transactions/blotter.

Finance

No knowledge in this area is required for this position. Employee will not be involved in financial analysis, budget design and control, asset liability management, risk analysis, tax standards, liquidity management, prediction of economic trends and rates, money market issues, investments, pricing/rate strategies or financial reporting.

Administrative Processes

Working Knowledge of in this area as it applies to processing transactions, completing documentation and verifying member information.

Communication

Working Knowledge in this area in regard to verbal and written communication techniques to meet the needs of differing audiences and communication objectives including active listening, revising methods of communication to deal with member concerns.

Granting of Commercial Credit

No Knowledge in this area required for this position. This position does not grant commercial loans or have commercial lending limits.

Granting of Consumer Credit

No knowledge in this area required in this position. This position does not grant retail loans or have retail lending limits.

Core Products and Services

Working Knowledge in this area in regard to the features and benefits of deposit, investment and lending products and services to make a sale, referral or direct enquiries.

Specialized Products and Services

Working Knowledge is required in this position; a solid understanding of the features and benefits of wealth management, products and services such as RRIFs, RRSPs, RESPs, Estate Planning or administration, financial planning, mutual funds, merchant MasterCard, commercial and retail lending products.

Regulations/Legislation/Credit Union System

Familiarity in this area. A basic understanding of the regulatory and legislative conditions under which Credit Unions operate and/or the provincial and national Credit Union structure and related organizations. Some examples are VantageOne Policies and Procedures, Deposit Insurance, and Canadian Payments Association.

Insurance

A familiarity in this area is required in this position, referral for Home Owner, Life Insurance and Travel.

Computer Based Systems Operations

A Working Knowledge in this area is required in this position. A solid understanding is needed for the purpose of retrieving, updating and manipulating information on the banking system, current loans origination system, current system used for credit checks, cash dispensing machines, central portal system, outlook, Member Direct, Member Link and automated teller machines to solve day to day problems.

Computer System Design, Development and Technical Support

No Knowledge in this area required in this position. This position is not responsible for evaluation, design, development, and maintenance or user support of computer systems or operations.

Human Resource Management

No Knowledge in this area required in this position. This position is not responsible for employee counselling, succession planning, or recruitment.

Marketing

No Knowledge in this area required in this position. This position is not responsible for participation in marketing planning.

Competitive Environment

Familiarity in this area is required in this position. A basic knowledge of the competitive environment as it relates to the degree of local competition, trends in the industry, products, and services and offered by others in our area.

Sales and Service

Working Knowledge in this area is required in this position as it refers to the application of sales techniques including; analyzing needs and identifying opportunities for up selling and cross selling, referring potential business opportunities to specialist staff, and closing the sale.

Strengths and Abilities

| Striving Strengths | Thinking Strengths | Relating Strengths |
|--|--|---|
| <ul style="list-style-type: none"> Ability to Achieve Desire to Succeed Competent Committed to be of Service to Others Ethical Available | <ul style="list-style-type: none"> Focused Disciplined Able to Arrange Responsible Problem Solving Ability Committed to Accuracy | <ul style="list-style-type: none"> Empathetic Caring Team Player Ability to build and sustain relationships Partnership and Advice Focused Positive Attitude |

PHYSICAL REQUIREMENTS

Physical exertion – Minimal this would include stooping, reaching, pushing, pulling

Visual attention – Constant more than ¾ of the time this may include intense reading of documentation or data, close monitoring of computer screens or detailed work

Travel – Minimal Travel. Travel either day to day or overnight is not required in this position

Manual Dexterity – Constant more than ¾ of the time which includes computer keyboarding and/or mouse work - 40 Wpm Keyboarding Skill

Nature of Supervision

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| Immediate Supervisor | Solutions Centre Manager |
| Supervisor Responsibility Level | No Supervision |
| Positions Supervised | None |

ACKNOWLEDGEMENTS

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|---|----------------|
| INCUMBENT: I have read the attached job description. _____ Signature Name (print) | Date Received: |
| Vice President, Consumer Banking Services _____ Signature Name (print) | Date Signed: |
| Vice President, Human Resources _____ Signature Name (print) | Date Signed: |
| Solutions Centre Manager _____ Signature Name(print) | Date Signed: |