



**TYPE:** External Advertisement  
**ROLE:** Part Time Solutions Centre Representative  
**BUSINESS LINE:** VantageOne Credit Union, Bargaining Unit

**DATE:** April 17, 2024

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**POSTING NUMBER:** EX 2024-06

**CLOSING DATE:** Until Filled

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**Company Overview:**

At VantageOne, we are neighbors helping neighbors. We have been helping our neighbors since 1944 when our first branch was opened in the North Okanagan. We are driven by a strong set of values that guide our actions and define our commitment to our members, clients, and employees. We are passionate about our Members and Clients, we are Action Driven to explore ways to innovation and simplify our member and client experiences, we take Ownership and Accountable for our actions and we are always striving to Be the Best. In addition, we are dedicated to promoting Diversity, Equity, Inclusion, and Reconciliation (DEIR) in all aspects of our organization.

Our mission is clear, we provide our communities with access to member-focused advice, high-quality financial services, and help our communities grow.

**Position Overview:**

We are currently seeking a dedicated Solutions Centre Representative to join our team. As the first point of contact for our valued members, you will play a pivotal role for all inquiries, concerns, and transactions, through phone calls, live chat, email, and video calls.

**Key Responsibilities:**

- Handle inbound and/or outbound calls, emails, chats, and video calls professionally and efficiently. Provide assistance, answer inquiries, resolve issues, and address customer concerns with empathy and patience. Excellent communication and interpersonal skills.
- Be able to explain product features, benefits, and any other relevant information to members accurately.
- Listen attentively to member concerns, identify the root cause of issues, and provide effective solutions or escalate to appropriate departments if necessary. Strive to resolve customer problems on the first contact whenever possible.
- Accurately post member transactions on the banking system. Accurately maintain member information, interactions, in VantageOne's CRM system. Ensure all member data is up-to-date and complete.
- Follow VantageOne policies, procedures, and scripts during customer interactions to ensure consistency and compliance with quality standards.
- Identify opportunities to promote additional products or services to members based on their needs and preferences.
- Referring banking concerns to appropriate personnel and ensuring compliance with regulations.

**Qualifications:**

- High School Diploma/Grade 12 and 1 – 3 years' experience as a Teller/ Member Services Representative preferably with call centre experience and investment product knowledge
- Excellent communication skills.
- Strong attention to detail and problem-solving abilities.
- Solid understanding of the features and benefits of deposit, investment and lending products and services wealth management, products, and services such as RRIFs, RRSPs, RESPs to make a sale, referral or direct enquiries.
- A solid understanding of computer based systems operation to retrieve, update and manipulate information on systems such as our banking system, Customer Relationship Management Software, cash dispensing machines, central portal system, Microsoft Office, Member Direct, Member Link and Automated Teller Machines (ATM).

**Why Join VantageOne?**

- Be a part of a team that is passionately committed to delivering exceptional client service.
- Opportunity for growth and career development within the company.

- Engage in a collaborative, dynamic, and inclusive work environment.
- Competitive compensation and benefits package. Hourly wage \$23.43 to \$30.29 per hour.
- Contribute to a workplace that values and prioritizes Diversity, Equity, Inclusion, and Reconciliation.

If you are ready to embrace our values, contribute to our mission of delivering high quality wealth management service to help our communities grow, and play a role in advancing DEIR principles, we encourage you to apply for the Part Time Administrative Assistant position. Join us in our journey to excel, innovate, simplify, and foster a diverse and inclusive work environment.

**To apply, please submit your resume and cover letter to [HR@vantageone.net](mailto:HR@vantageone.net). We welcome applications from all interested; however, only those selected for an interview will be contacted.**



## Job Description

<b>POSITION TITLE:</b>	<b>Solutions Centre Representative</b>
<b>BUSINESS:</b>	<b>VantageOne Credit Union</b>
<b>UNIT/DEPARTMENT:</b>	<b>Solutions Centre</b>
<b>LOCATION:</b>	<b>Main Branch</b>
<b>REPORTS TO:</b>	<b>Solutions Centre Manager</b>

### 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 an 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 Skillsoft 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 Homeowner, 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 analysing 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"> <li>• Ability to Achieve</li> <li>• Desire to Succeed</li> <li>• Competent</li> <li>• Committed to be of Service to Others</li> <li>• Ethical</li> <li>• Available</li> </ul>	<ul style="list-style-type: none"> <li>• Focused</li> <li>• Disciplined</li> <li>• Able to Arrange</li> <li>• Responsible</li> <li>• Problem Solving Ability</li> <li>• Committed to Accuracy</li> </ul>	<ul style="list-style-type: none"> <li>• Empathetic</li> <li>• Caring</li> <li>• Team Player</li> <li>• Ability to build and sustain relationships</li> <li>• Partnership and Advice Focused</li> <li>• Positive Attitude</li> </ul>

**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**

<b>Immediate Supervisor</b>	Solutions Centre Manager
<b>Supervisor Responsibility Level</b>	No Supervision
<b>Positions Supervised</b>	None