



VantageOne
CREDIT UNION

Career Opportunity

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

DATE: 02Sept2025

POSTING NUMBER: 2025-11

CLOSING DATE: **INTERNAL:** September 6, 2025
EXTERNAL: Until Filled

Company Overview:

At VantageOne, we are your financial neighbour. 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 are focused on building relationships to strengthen financial ability and work to improve and grow our communities.

Position Overview:

The Solutions Centre Representative works in our call centre, serving as the first point of contact for all non-branch interactions with members, prospects, and the public. As the voice of the Credit Union and its subsidiaries, you'll provide service and support across multiple channels.

You'll be responsible for delivering exceptional service experiences, resolving inquiries quickly and accurately, and helping connect members with the products and services that best support their financial goals. In addition, you'll proactively identify opportunities to build relationships, grow business, and promote our full range of financial solutions.

What You'll Do

Sales & Service

- Deliver superior service and support to members and prospects building lasting relationships.
- Act as the main contact for all branches/subsidiaries through the Main Switchboard
- Connect with members across multiple channels
- Proactively uncover opportunities to grow business and promote Credit Union products
- Support member onboarding through personalized follow-up (calls, letters, emails)
- Troubleshoot technology, website, and service questions to ensure smooth member experiences
- Schedule appointments, provide product knowledge, and ensure timely follow-ups

Non-Cash Transactions

- Process member-initiated transactions, investments (registered and nonregistered) and wire transfers
- Perform data entry for noncash banking activities
- Comply with internal policies, privacy standards and AML legislation.

Administration & Teamwork

- Track sales, service opportunities and referrals electronically
- Assist with administrative duties and report reviews
- Participate in team meetings, provide support to colleagues and collaborate across departments.

What We're Looking For

Education & Experience

- High School Diploma (Grade 12) plus additional courses
- 1-3 years experience as a Teller/Member Services Representative (preferably with call centre and investment product knowledge)

Skills & Knowledge

- Strong communication skills (verbal, written, active listening)
- Working knowledge of deposit, investment and lending products
- Understanding of registered investment products (RRSP, TFSA, RESP, RRIF, estate planning)
- Familiarity with Credit Union systems, policies, and competitive environment
- Proficiency with computer-based systems, banking software, and digital communication tools.

Strengths & Abilities

- Service-oriented, empathetic, and relationship-focused
- Disciplined, accurate, and problem-solving mindset
- Driven to achieve goals while maintaining ethical standards
- Team player with a positive attitude and strong commitment to members

Why Join VantageOne?

- Be a part of a team that is passionately committed to delivering exceptional 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 is \$25.68 to \$33.20 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 building relationships to strengthen financial ability and work to improve and grow our communities, and contribute to advancing DEIR principles, we encourage you to apply.

To apply, please submit your resume and cover letter to HR@vantageone.net. We welcome applications from all interested; however, only those selected for an interview will be contacted. The successful candidate will be required to meet fidelity bonding requirements, including completion of references, a criminal record check, and credit check.

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 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"> 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 $\frac{3}{4}$ 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 $\frac{3}{4}$ of the time which includes computer keyboarding and/or mouse work - 40 Wpm Keyboarding Skill

NATURE OF SUPERVISION

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