

Member Experience Branch Representative Job Description

Full Time/Non-Exempt Position

Reports to the Sr. Branch Experience Manager

Location: Washington, DC (In-Person)

Objective

The Member Experience Branch Representative contributes significantly to the success of the branch by delivering exceptional member experiences, fostering long-lasting relationships, and identifying appropriate solutions for members while also managing the traditional teller responsibilities. The overall objective is to effectively execute all service transactions and sales routines to deepen member relationships and identify members' financial needs and to present appropriate Credit Union solutions.

Job Responsibilities

- Engage members as they enter the branch by welcoming and making them feel appreciated, including managing lobby traffic, sharing digital solutions and identifying the financial needs of the member.
- Assist members with the new account opening process (Share savings, Share drafts and Share certificates), while following all compliance processes and procedures.
- Relationship focused review of member profile and accounts to recommend appropriate products and services to further enhance member financial journey.
- Process in-branch domestic and international wire transfer requests for members.
- Take full ownership of members' issues to resolve member issues/disputes promptly and effectively to ensure complete member satisfaction with proper resolution.
- Assist members with everyday teller transactions such as deposits, withdrawals, payments, issuance of cashiers' checks, replacement debit card orders, updating tax forms and bad addresses, accurately and efficiently, while complying with all policies, procedures and regulatory requirements.

- Assist in daily processing of mobile deposits, maintenance of weekly ATM settlements, check copies and statement requests and documentation uploading to correct files/systems.
- Educate members on self-service capabilities and encouraging the use of digital service channels (e.g., Website, Zelle, Mobile App, and ATMs).
- Become a subject member expert for the branch and remain flexible in position based on the branch coverage needs.
- Listen carefully to the member and willingly assist with any member questions or issues.
- Maintain ongoing knowledge and complete understanding of IDB Global Federal Credit Union's product offerings, campaigns, events, procedures, and policies.
- Create a warm, welcoming and friendly environment for members and employees by fostering teamwork in the branch to ensure a positive overall member experience.

Requirements

- High School diploma or equivalent required.
- Associate or bachelor's degree preferred.
- Strong attention to detail and time management.
- Customer service focused with experience managing complex transactions across multiple systems.
- Ability to learn products, services, procedures and systems quickly and accurately.
- Spanish and English language fluency (verbal and written) is strongly preferred.
- 1-3 years in sales/service in the financial services or comparable industry preferred.
- Punctual, dependable and proactive initiative-taking.
- General understanding of banking products and services preferred.
- Previous teller experience or cash handling experience is strongly preferred.
- Experience with digital engagement and basic sales/referrals.
- Excellent people skills
- Basic computer skills and digital tools skills
- Demonstrates professional demeanor and appearance.