

UNIVERSITY OF SOUTHERN CALIFORNIA

Credit Union Business Development Representative

Job Code: 115041

Grade:	I
OT Eligible:	Yes
Comp Approval:	1/1/2007

JOB SUMMARY:

Serves as the Credit Union's outside sales representative by actively identifying, cultivating, soliciting, developing, and servicing comprehensive personal banking relationships with selected members and pools of members.

JOB ACCOUNTABILITIES:

*E/M/NA % TIME

- | | | |
|-------|-------|--|
| _____ | _____ | Plans, organizes, coordinates, and conducts comprehensive personal banking services, programs projects, and events. Recommends goals for assigned programs and projects. Promotes the credit union at every available opportunity, including but not limited to faculty, staff and student orientations and University and affiliated events. |
| _____ | _____ | Develops and implements sales strategies designed to meet specific credit union goals. |
| _____ | _____ | Identifies, cultivates, solicits, develops, and maintains relationships with members and potential members. Initiates contacts and assesses member/potential member needs to determine cross-sale opportunities. Solicits and sells multiple account relationships with select membership groups. |
| _____ | _____ | Develops new or revises existing products, services or prices as needed. |
| _____ | _____ | Provides mortgage loan origination services. Counsels members on credit union mortgage programs, determines member mortgage needs and matches member needs with the appropriate credit union mortgage loan. Solicits application, assists members with application process and forwards completed application and supporting documentation to the mortgage processing staff. |
| _____ | _____ | Develops and coordinates acknowledgement and recognition processes for members and potential members. |
| _____ | _____ | Conducts research to update and expand member base. |
| _____ | _____ | Provides comprehensive written reports on development efforts. Provides statistical reports and calendars as requested. Monitors and tracks member activity in sectors served by the development office. Maintains and updates member records and accounts. |
| _____ | _____ | Identifies budget requirements and staffing needs on a project or event basis. Monitors and reconciles budget activity. Gathers facts and data used to develop a budget. Provides forecasts and projections used to develop a budget. |
| _____ | _____ | Creates informational and marketing materials for assigned programs. |
| _____ | _____ | Interacts with other University departments, as required. |
| _____ | _____ | Represents credit union at professional meetings and seminars in order to continue professional development. |

Performs other related duties as assigned or requested. The University reserves the right to add or change duties at any time.

***Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.**

EMERGENCY RESPONSE/RECOVERY:

Essential: No

Yes In the event of an emergency, the employee holding this position is required to "report to duty" in accordance with the university's Emergency Operations Plan and/or the employee's department's emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

JOB QUALIFICATIONS:

Minimum Education:

High School or equivalent

Minimum Experience:

2 Years

Minimum Field of Expertise:

Sales and/or service experience.

Preferred Education:

Bachelor's Degree

Preferred Field of Expertise:

Business development experience with a financial institution.

Skills: Other:

Communication -- written and oral skills
 Conceptualization and design
 Consulting
 Creative writing and editing
 Development/fundraising
 Knowledge of applicable laws/policies/principles/etc.
 Lead/Guidance Skills
 Marketing
 Networking
 Organization
 Planning
 Problem identification and resolution
 Project management
 Public relations
 Public speaking/presentations
 Research
 Scheduling

Skills: Machine:

Calculator
Computer Network (Department or School)
Personal Computer

Supervises: Level:

Leads one or more employees performing similar work

Supervises: Nature of Work:

Administrative

SIGNATURES:

Employee: _____ **Date:** _____

Supervisor: _____ **Date:** _____

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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