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# Member Services Representative

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| <b>Multiple Locations:</b><br>Mississauga, Ontario<br>Oakville, Ontario | <b>Posted Date:</b> December 14 <sup>th</sup> , 2021 |
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## **Overview:**

BCU Financial is looking for a skilled problem solver with strong interpersonal skills to join our team as a Member Services Representative. We need an enthusiastic individual who can listen to customer service issues and then offer a unique and innovative solution to each problem. The successful candidate for this role will have a strong command of the company's customer service policies, and be well-trained in product knowledge including technology platforms that can be critical for offering quick and accurate assistance to customers. This individual reports to the Branch Manager.

## **Responsibilities:**

- Answer incoming customer calls regarding billing issues, product problems, service questions and general member concerns.
- Assist and direct members in-branch to use available technology to fulfill banking transactions (i.e. ATM-deposits, e-transfers online).
- Assist members with using technology such as online banking questions and refund requests.
- Execute member wire transfers and online bill payment tracing (OLT) as per request.
- Initiate requests for cheque books, member cards, stop payments, account information updates and member statement.
- Review and forward emails from the member services mailbox.
- Update member account information and track customer service calls.
- Answer general client enquiries, resolve client issues and follow-up.
- Prepare reports for Branch Operations Manager as needed.
- Process incoming mail.
- Provide overrides to Teller staff when required.
- Provide back-up for Treasury duties when required.
- Order and maintain office supplies and documentation.
- Oversee and respond accordingly to daily operational matters.
- Participate in developing campaigns and/or project initiatives.
- Attend Marketing meetings when required.
- Remain updated on product knowledge and be informed of any changes in company policies.
- Proficiently use BCU platforms and systems.

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- Responsible for maintaining a high level of professionalism with members and working to establish a positive rapport with every member.
  - Adhere to applicable industry regulations, privacy laws and BCU policies and procedures.
  - Other duties as required.

**Requirements:****Knowledge:**

- Knowledge of banking products and services.
- Experience with the Ovation banking platform and Doxim CRM is an asset.

**Skills & Abilities:**

- Exceptional customer and sales skills and experience.
- Strong technological skills; including tablet and mobile applications.
- Solid troubleshooting abilities and decision making skills, both proactive and reactive.

**Education/Experience:**

- Relevant working experience or any equivalent combination of experience, training and/or education.
- Proficiency in Microsoft Office Suite applications specifically, Excel and Word.

**Compensation:**

This is a full-time position offering a competitive compensation and benefits package commensurate with experience and qualifications.

BCU Financial is a member-owned, financial cooperative dedicated to improving the lives of members and their community. BCU Financial is a part of BCU Financial Group – a fast-growing Ontario-based financial group providing Canadians with diversified services and products. BCU Financial Group offers its members a real alternative to high-fee, big-name banking by providing no-fee chequing accounts, competitive savings accounts, loans, mortgages, cards, investment services, online banking, and insurance services. BCU Financial, together with its BCU Wealth Management division, currently oversees \$1 billion in assets.

BCU Financial Group also recognizes the importance of building a strong community. That's why it provides generous sponsorship funding annually to a wide array of community-based projects and activities. The Credit Union and its member-supported charitable institution, BCU Foundation, provide sponsorship funding of over \$1 million annually for community organizations, charity fundraisers, student scholarships, cultural events, and educational projects.

BCU Financial Group is an equal opportunity employer dedicated to building an inclusive and diverse workforce. BCU Financial Group provides accommodations during the recruitment process upon request. Requests received relating to accommodation will be addressed confidentially.

**Please submit all applications to Ivanna Purkiss, Head of People, Communications, and Community, at [ivanna.purkiss@bcufinancial.com](mailto:ivanna.purkiss@bcufinancial.com).**