



Member Service Representative (MSR) Supervisor - Position Description

POSITION SUMMARY

Using leadership and communication skills, the MSR Supervisor coaches their team and drives them to succeed whilst ensuring they continue to provide exceptional service. Situations can move quickly from low stress to high stress and can require flexible hours.

ESSENTIAL FUNCTIONS

- Provide leadership and management to direct reports. Including but not limited to: performance management, training and development and accountability
- Provide timely, accurate and complete reports on the functions and performance of direct reports and ensure steps are taken to correct unsatisfactory results
- Recommend procedure changes that increase efficiencies and maintain compliance
- Ability to follow TOPCU policies and procedures and know the laws, rules and regulations regarding all forms of new accounts and consumer lending
- Originate and open all types of member deposit accounts
- Assist team members with questions and concerns and provide necessary/requested information
- Collaborate with HR to determine additional training needs for direct reports
- Collaborate with other departments to ensure relevant information is shared and correct training has been completed
- Lead team meetings as necessary
- Open Individual Retirement Accounts and process transactions
- Originate, process and fund all types of consumer loan applications
- Assist members via appropriate channels with requests, problems and complaints including escalated calls
- Follow-up on commitments and member interactions with verbal and/or written communication.
- Provide members with professional and friendly service
- Promote and cross sell appropriate products and services to meet individual, departmental and company goals
- Make effective referrals to other specialists
- Understand how TOPCU products compare to the competition and train team as assigned
- Perform overrides as needed
- Support the Branch Management with sales and operational activities
- Utilize TOPCU products and systems to cross sell to members and develop direct reports abilities in this area
- Understand compliance issues, adhere to regulations, and attend training as related to the position
- Assist MSR's with complex transactions and problem resolution
- Identify and recommend training opportunities for self and direct reports

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- Our mission and values, and communicate it to all members internal and external
- TOPCU's products, services, policies and procedures
- All applicable state and federal regulations
- Microsoft (Word, Excel, Power Point), Windows and all programs/software applicable to department

Skills:

- Organization and time management
- Analytical and mathematical
- Written and verbal communication
- Active listening
- Problem-solving

Ability to:

- Make product/service recommendations that meet member’s financial needs
- Follow TOPCU policies and procedures
- Understand relevant federal and state regulations and apply to job functions effectively
- Work in a fast-paced, highly motivated atmosphere
- Learn and utilize computer based operational systems applicable to department

MINIMUM EDUCATION, EXPERIENCE AND TRAINING

- High School Diploma or GED
- Two years of experience in a sales culture
- Two years of experience originating new accounts and loans
- Two years of experience in member-focused, fast-paced service-oriented environment
- Leadership/supervisory

PRE-EMPLOYMENT

Pre-employment Credit Check: Yes
 Pre-employment Bondability Check: Yes
 Pre-employment Drug Testing Required: Yes
 Pre-employment Background Required: Yes

Reports to:	Assistant Branch Manager	FLSA:	Hourly – Non-exempt
Location:	Assigned Branch	Status:	Full-Time
Reviewed:	11/8/18 M Scarzello	Created:	6/14 (updated: 11/18)
Supervisor:	Yes		

Physical Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)
Repetitive Motion	Repeating movements of arms, hands, wrists, fingers				X
Talk	Express or exchange ideas verbally				X
Hear	Perceive sound by ear				X
See	Obtain impressions through the eye				X
Kneel	Bend legs at knee, come to rest on knees			X	
Crouch/Squat	Bend body down and forward, bending legs and spine			X	
Crawl	Move on hands, knees, and feet	X			
Climb	Ascend/descend ladders, stairs, ramps	X			
Sit	Sit				X
Stand	Stand			X	
Walk	Move about on foot; average distance per shift 3-5 miles		X		
Bend/Stoop	Bend downward and forward by bending spine at waist			X	

Lift	Raise or lower object > 10 lbs. from one level to another			X	
Lift	Raise or lower object > 25 lbs. from one level to another			X	
Carry	Transport an object				X
Push	Press with steady force, thrust objects forward, downward, outward		X		
Pull	Drag or tug objects		X		
Turn/Twist	Move a body part in circular motion			X	
Balance	Exceeding ordinary body equilibrium	X			
Reach	Extend hands and arms in any direction			X	
Handle	Seize, hold, turn with hands				X
Distinguish Color	Ability to distinguish color				X
Fingering	Picking, pinching, typing, or otherwise with fingers rather than whole hand				X
Grasping	Applying pressure to an object with the fingers and palm			X	
Feeling	Perceiving attributes of objects, such as size, shape, temperature, or texture		X		
Mental / Cognitive Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)
Communication	Comprehend and use basic language, either written or spoken, to communicate information and ideas				X
	Comprehend and use technical or professional language, either written or spoken, to communicate complex ideas				X
Calculation	Perform numerical operations using basic counting, adding, subtracting, multiplying, or dividing				X
	Perform complex quantitative calculations or reasoning using algebra, geometry, statistics, or abstract symbols	X			
Problem Solving	Formulate and apply appropriate course of action for routine or familiar situations				X
	Use logic to define problem, collect information, establish facts, draw valid conclusions, interpret information and deal with abstract variables for unique or unfamiliar situations			X	
Environmental Conditions	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs/day)	Frequently (activity or conditions exist 2.5-5.5 hrs/day)	Constantly (activity or conditions exist 5.5+ hrs/day)
Weather And Temperature	Protection from weather conditions but not necessarily from temperature changes				X
	Subject to outside environmental conditions – no effective protection from weather	X			
	Activities occur inside and outside		X		
	Subject to extreme cold (typically below 32°)	X			
	Subject to extreme heat (typically above 100°)	X			
Atmospheric Conditions	One or more of the following conditions that affect the respiratory system of the skin: fumes, odors, dusts, mists, gases, or poor ventilation		X		
	Worker is required to wear a respirator	X			
Noise	Sufficient noise to cause the worker to shout in order to be heard above the ambient noise level	X			
Vibration	Exposure to oscillating movements of the extremities or whole body	X			
Hazards	Proximity to moving mechanical parts, moving vehicles, electrical current	X			
	Working on scaffolding and high places	X			
	Exposure to chemicals	X			
	Exposure to oils: air and/or skin exposure to oils and other cutting fluids	X			
	Worker is required to function in narrow aisles or passage ways	X			
	Worker is exposed to infectious diseases	X			
	Worker is required to function around prisoners or mental patients	X			

Physical Requirements Checklist

SEDENTARY

- Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body.
- Sitting most of the time.

LIGHT

- Exerting up to 20 pounds of force occasionally and/or a negligible amount of force constantly to move objects.
- Use of arm and/or leg controls requiring greater exertion of force than for sedentary work, and worker sits most of the time.

MEDIUM

- Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.

HEAVY

- Exerting up to 100 pounds of force occasionally and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.

VERY HEAVY

- Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force constantly to move objects.

This position description is intended to indicate the basic nature of the position(s) allocated to this class and examples of typical duties that may be assigned. Any one position may not include all of the duties listed, nor do any listed examples include all tasks, which may be found in positions of this class. This position description does not constitute an employment agreement between the employer and employee and is subject to revision by the employer as the needs of the employer change and/or requirements of the job-related duties expand or are updated.