

Credit Union West

POSITION DESCRIPTION

POSITION TITLE: Director of Digital Delivery & Member Experience **DEPARTMENT:** Operations Support
CLASSIFICATION: Exempt **APPROVED BY:** People & Culture
GRADE: 1200 **DATE APPROVED:** 1/2023

REPORTING RELATIONSHIPS

POSITION REPORTS TO: Vice President of Retail Delivery

POSITIONS SUPERVISED: Branch Manager I, II & III, Operations Support Manager, and Member Contact Center Manager

POSITION SUMMARY

The Director of Digital Delivery & Member Experience is responsible for administration, leadership and development of the Member Contact Center, Operations Support, and multiple branch locations. This individual drives digital and retail growth; leading with a digital first approach. This individual is a strategic leader that enhances the quality of life for our members/team members by leveraging people and technology for increased member engagement and product offerings. They will spearhead the expansion of delivery channels, capabilities, and offerings to create exceptional member experiences encompassing all member contact points. This individual will establish and monitor branch/department budgets and growth goals in support of organizational key performance indicators.

Essential Functions & Additional Responsibilities

40% Strategy & Change Agility – Provides vision, leadership and direction in the planning and implementation of organizational goals, priorities, projects, and technology to support member delivery channels. Collaborates with executive management and key stakeholders to develop long-term optimization and transformation plans. Builds involvement, sponsorship, ownership, excitement, and empowerment when changes are implemented. Leads project teams and manages multiple concurrent objectives and activities while prioritizing and allocating time for deliverables.

25% Performance – Ensures delivery of exceptional member experiences encompassing all member contact points with a heightened focus on digital delivery. Responsible for effective performance in sales, service, and operational controls within all areas of oversight. Ensures accurate document management of forms and procedures. Ensures members legally appointed intentions are honored when supporting review of Trust, Estates, Deceased and other specialty accounts. Ensures successful performance of established metrics contact center metrics. Completes, analyzes, and validates reports, identifying trends and making recommendations for process improvements.

15% Management – Prepares professionally written employee documents and coaches managers on effective documentation. Responsible for upline review and direction related to documentation including promotion requests, annual appraisals, and corrective actions. Monitors employee performance and ensures managers are delivering on performance expectations for areas of oversight. Ensures branches and departments are working in tandem to support standardized practices and procedures.

15% Leadership, Culture and Engagement – Cultivates a collaborative environment and workplace experience that hires, develops, and recognizes quality talent to meet the needs of the membership. Provides leadership, coaching, and mentorship to strengthen the Credit Union’s bench of future leaders and achieve business objectives. Lead in a way to inspire the mission and values of the organization to develop effective leaders and increase employee engagement to become an employer of choice.

5% Performs other duties as assigned.

EDUCATION: Equivalent to a four-year college degree or completion of a specialized course of study at an accredited educational facility preferred.

EXPERIENCE: 5-8 years of leadership experience in a financial institution or similar industry; or an equivalent combination of education and experience.

Skills & Competencies

- Use of personal internet-enabled Smartphone for Branch operating applications.
- Live the mission, vision, and core values of the credit union.
- Able to communicate effectively and tactfully with employees and members both orally and in writing.
- Exceptional leadership skills: ability to motivate, influence, and engage direct and indirect reports and peers with a significant level of diplomacy and trust.
- Excellent judgment and creative problem-solving skills including negotiation and conflict resolution skills.
- Energetic, forward-thinking, and creative in business solutions with high ethical standards and trustworthiness.
- Act as a change agent who can collaborate with diverse interests and adapt to internal, market or regulatory-driven changes.
- Proven, high-level experience of decision-making within the discipline and authority of the role.
- Use of advanced logic to make highly complex judgments with a material impact at the organizational level.
- Work as a team member and possess positive influencing skills to bring others to new thinking and mindset.
- Present a professional, courteous image when interacting with members, co-workers, the Board of Directors, management, business partners, and the community to build strong collaborative business relationships.

- Maintain working knowledge of Microsoft Office, SharePoint, and collaborative tools (Teams and Zoom).
- Thorough knowledge and understanding of organization’s Employee Handbook and policies.
- Must demonstrate functional knowledge of the Bank Secrecy Act in addition to other Federal laws, including but not limited to: U.S. Patriot Act, Office of Foreign Assets & Control, Anti-Money Laundering, Right to Financial Privacy Act, and the Bank Bribery Act.

WORKING ENVIRONMENT STANDARDS & EXPECTATIONS

- No hazardous or significantly unpleasant conditions (such as in a typical office).
- Commitment to safety standards, cleanliness of workspace, and flexible work opportunities.

INTENT AND FUNCTION OF POSITION DESCRIPTIONS

Position descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed position descriptions are an integral part of any effective compensation system. All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all-inclusive. Additional functions and requirements may be assigned by managers as deemed appropriate.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.

Position descriptions are not intended as and do not create employment contracts. The organization maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.

EMPLOYEE ACKNOWLEDGEMENT

I acknowledge, by my signature below, that I have read and understand the above position description and essential functions of the job including the physical demands, work environment, and the standards expected of me. I also understand that nothing in this position description is meant to create a contract of employment or alter in any way the employment-at-will status of this job.

Employee Signature

Date

Print Name

Note: Please submit your request in writing to the People & Culture Department if you wish to discuss reasonable accommodations to help you perform the essential functions of this job.