MEMBER SERVICES SUPERVISOR

JOB TITLE:	Member Services Supervisor
DEPARTMENT:	Member Services
EXEMPT/NON-EXEMPT STATUS:	Non-Exempt
PAY GRADE:	8
REPORTS TO:	Branch Manager
DATE:	March 2026

POSITION SUMMARY:
The Member Services Supervisor is a frontline leader who sets the standard for service excellence and sales performance at the branch level. This role directly supervises Tellers and Member Service Representatives, ensuring every member interaction reflects the Credit Union's commitment to accuracy, professionalism, and a needs-based approach to service. The Member Services Supervisor is the first-level escalation point for member and operational issues, maintains transactional integrity, and actively builds a branch culture where quality service and consistent sales achievement are the expectation — not the exception. This role works closely with the Branch Manager to drive branch results and member satisfaction.

ESSENTIAL POSITION RESPONSIBILITIES:

Staff Supervision & Performance Accountability: Directly supervises Tellers and Member Service Representatives daily. Establishes clear, non-negotiable expectations for service quality, accuracy, and sales performance. Monitors work quality, addresses performance gaps promptly, and provides ongoing coaching and constructive feedback. Ensures all staff are properly trained, certified in their roles, and operating in full compliance with Credit Union policies and procedures. Conduct regular one-on-one meetings and team huddles to reinforce goals and keep staff aligned with branch priorities. Must provide flexible weekday hours and Saturdays

Service Quality & Sales Culture: Champions a branch environment where every member interaction is an opportunity to deliver exceptional service and identify financial needs. Coaches staff on consultative member engagement — actively listening, recognizing cross-sell and referral opportunities, and recommending appropriate Credit Union products and services. Holds staff accountable to individual and branch sales goals and celebrates achievements to sustain motivation and momentum. Models the behaviors and service standards expected of all branch staff.

Transaction Processing & Member Service Delivery: Assists with member account transactions when volume requires, including deposits, withdrawals, loan payments, transfers, check cashing, check scanning, and account openings. Serves as the first-level escalation point for member concerns, resolving issues with professionalism, accuracy, and urgency. Monitors' lobby flow to maximize service efficiency and ensure a consistently positive member experience.

Transactional Accuracy & Cash Management: Maintains a high standard for transaction processing and cash handling across the branch. Monitors cash drawer balancing and oversees vault management, cash recyclers, coin machine balancing, and negotiable items inventory. Ensures all reconciliation is completed accurately and on schedule. Responsible for the consistent and proper execution of branch opening and closing procedures.

Branch Communication & Operational Reporting: Maintains open and timely communication with the Branch Manager regarding operational issues, system outages, staff concerns, and member service trends. Assists with in-branch marketing initiatives and may represent the Credit Union at bank-at-work programs and community events. Monitors branch equipment and ATMs, escalating maintenance or facilities concerns as needed.

Schedule Requirements: This position requires flexibility across weekday hours based on departmental staffing needs. Availability for Saturday hours is also required as part of the regular work schedule.

Special Projects & Additional Duties: Performs additional duties and special projects on an as-needed basis as assigned by management.

PERFORMANCE MEASUREMENTS:

- Staff consistently deliver friendly, professional, and personalized service in every member interaction.
- Branch cross-sell and referral goals are met or exceeded through active coaching, accountability, and a sustained sales culture.
- Member transactions are processed with minimal errors and member inquiries are resolved in a timely and accurate manner.
- Cash levels, vault, and all drawers are properly balanced with low tolerance for unresolved discrepancies.
- All branch operations are fully compliant with Credit Union policies, procedures, and applicable regulations.
- Individual and branch goals are met or exceeded.
- Staff are trained and regularly evaluated through structured coaching and feedback.
- Branch opening and closing procedures are executed consistently and correctly.
- A dependable record of attendance, professionalism, and workplace standards is maintained.

REQUIRED STANDARDS FOR ALL EMPLOYEES:

Ensure quality service in all member interactions. Maintain a positive, respectful, and professional work environment for members, co-workers, supervisors, vendors, and visitors. Maintain complete confidentiality of member, employee, and Credit Union information. Abide by the Bank Secrecy Act and ensure the safety and soundness of the Credit Union in all transactions and interactions. Adhere to and uphold all written policies and procedures of the Credit Union, including BSA/CIP, OFAC monitoring and reporting, and all related policies and regulations.

NOTE: This list of essential functions is not intended to be exhaustive. It may be supplemented from time to time as required and at the request of one's supervisor and/or senior management.

KNOWLEDGE, SKILLS, AND EXPERIENCE REQUIRED FOR THE POSITION:

- Minimum of 2 years of experience in a bank or credit union environment in cash handling, member service, and/or consumer lending functions. Supervisory or training experience preferred.
- High school diploma or equivalent required; additional coursework in business or finance preferred.
- Thorough knowledge of credit union products and services, and applicable regulations including Bank Secrecy Act, OFAC, Reg CC, and Reg E.

- Proficiency with core credit union systems, including Symitar, and MS Office Suite (Word, Excel). Familiarity with lending and credit rating software preferred.
- Demonstrated ability to drive sales results through staff coaching, goal-setting, and accountability; comfort with a sales-focused service environment.
- Professional, well-developed interpersonal and communication skills, with the ability to effectively interact with members, staff, management, and vendors.
- Ability to read, analyze, and interpret reports, procedures, and regulations; ability to respond professionally to varied member or operational inquiries.
- Intermediate mathematical skills required, including percentages, interest calculations, and cash reconciliation.
- Ability to work on a keyboard and stand or sit for prolonged periods; ability to communicate orally and in writing with members and staff; ability to wear a headset when required.

ACKNOWLEDGMENT

This position description describes the general nature and level of work being performed. It is not an exhaustive list of all responsibilities, duties, and skills required. Management reserves the right to modify this description at any time in accordance with business needs and regulatory requirements.

Employee Signature ____________________ Date ____________________