

WINGA FINANCIAL FCU JOB DESCRIPTION

POSITION: **REGIONAL MANAGER**
REPORTS TO: Director - Regional Offices

POSITION PURPOSE: Plans, conducts, and coordinates outside business development sales calls with potential groups eligible for credit union membership. Directs and manages sales of credit union asset and liability products and services to members through well-trained, motivated, and enthusiastic Financial Service Representatives. Links department goals with overall credit union goals and objectives. Sets individual sales goals, measures performance through tracking systems, and gains commitment from employees on sales and service plan. Plans and conducts regular sales and service meetings. Hires, trains, motivates, recognizes, and rewards sales and service staff. Coordinates deposit products; recommends enhancements to existing products and develops new products to meet both the member's needs and the credit union goals.

REQUIREMENTS:

- Experience conducting outside business development sales calls
- Demonstrated ability to lead, direct, and motivate others to action through recognition and rewards
- Proven sales leadership skills; ability to evaluate individual strengths and weaknesses and utilize coaching and counseling skills
- Role model of positive personal projection as demonstrated by professional business appearance, enthusiastic attitude, and exceptional interpersonal skills
- Proven ability to develop, set, and communicate measurable goals
- Ability to analyze problems, formulate and implement solutions
- Demonstrated ability to set priorities, manage time effectively
- Excellent oral and written communication skills
- Knowledge of credit union products, policies, and procedures and of federal rules and regulations

RESPONSIBILITIES:

A. Staff Development

- Interview and hire employees who demonstrate exceptional sales and quality service skills.
- Establish individual goals and develop a customized performance plan for continual development of each employee.
- Through observation and tracking reports, regularly assess employee skill levels and ensure that employees receive ongoing sales skills, service skills, and technical skills training.
- Coach and counsel employees to meet and exceed their performance plan goals.
- Develop relationship with each employee to understand their individual motivational needs.
- Continuously reinforce outstanding employee performance through formal and informal recognition and rewards.

B. Sales Management

- Plan, conduct, and coordinate outside business development sales calls with

- potential groups eligible for credit union membership.
- Create and implement a department sales plan which ties the annual credit union goals and mission statement to department goals and to the individual employee action plan.
- Establish and revise job descriptions and performance evaluations which support a sales and quality service culture.
- Plan and conduct regular sales and service meetings to support and reinforce continued development of employee's sales and service skills.
- Maintain competitor awareness and ensure employees include the advantages of Wings Financial FCU products and services in presentations to members.
- Utilize sales tracking systems to monitor progress toward established goals, to set new goals, and for use in coaching and counseling employees.

C. Member Service Delivery

- Achieve or exceed service performance goals for department.
- Ensure staff is adhering to Wings Financial FCU Standards of Professionalism.
- Utilize reports, observation, and other tracking methods to measure employee service performance.
- Ensure transaction accuracy and member and employee confidentiality.

D. Productivity and Profitability

- Develop annual department business plan directly linked to credit union and executive management goals.
- Establish productivity standards and regularly measure department productivity and service levels.
- Establish annual department income and expense budget.
- Regulate staffing levels to optimize member service, income and expense levels, and employee needs.
- Analyze, review, and recommend changes to existing deposit products. Develop new products to meet member needs and credit union goals.

E. Communications

- Establish and maintain effective, 360° communications.
- Be an effective team player promoting cooperation between branches, staff, managers, and executives.
- Participate actively in management and committee meetings.

PHYSICAL REQUIREMENTS:

Light work - predominantly standing or sitting for extended periods, and walking. Limited amount of force exerted in lifting, carrying or pushing objects. May exert up to 20 lbs. of force to move an object. Occasional stooping/bending. Motor coordination, finger dexterity and manual dexterity. Reasonable accommodations may be made to enable individuals with disabilities to perform required functions.