

**Competition:** 10-34-01

**Closing Date:** Until Filled

**Location:** Grande Prairie, Downtown Branch

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## Servus

Servus Credit union is one of Canada's 50 Best Managed Companies and recognizes that our most valuable assets are our employees. We offer continued growth and career advancement and reward employees for their efforts and achievements. Servus Credit Union has also been recently recognized by Alberta Venture as one of the top 3 employers in Alberta for Human Resources Practices and Policies.

## The City of Grande Prairie

Grande Prairie is a growing community with a population of approximately 50,227 residents. The city is located 484 kilometers from Edmonton on highway 43. The economic sectors for the area are Agriculture, Forestry, Oil and Gas. The city hosts several recreational amenities including: Multi-Plex and Aquatic Centre (Under Construction), Nitehawk Ski Hill, Muskoseepi Park, Evergreen Park, Wapiti Nordic X-Country Ski Club, South Bear Creek Park Ball Diamonds, Coca-Cola Centre, Crystal Centre, Gymniks Gymnastics Facility, Grande Prairie Cultural Centre, Grande Prairie Live Theatre, The Leisure Centre (indoor Swimming, Fitness and Soccer), as well as 14 golf courses. Grande Prairie has two secondary schools as well as several Public and Catholic schools.

## The Position

The Assistant Branch Manager II (ABM II) is a senior member of a dynamic retail branch team, and plays an integral role in the delivery of superior personalized service to our member owners. The ABM is developing their leadership skills, and is fully conversant in all forms of personal/business banking. They use their coaching skills and expertise to assist their staff in helping members achieve their financial goals through a needs analysis process. They display effective business development and retention skills and strive to attain personal, branch and corporate goals by identifying opportunities to sell or refer products and services. They foster an environment in which our members feel at home, perceive our staff as knowledgeable, and view Servus Credit Union as a good corporate citizen. As an emerging leader within our Credit Union they play a vital role in the growth and profitability of our organization, the financial well-being of our members, and the retention and engagement of our employees..

## KEY RESPONSIBILITY AREAS:

**Member Experience (Adherence to our Member's First standards)**



- Coach/Mentor/Motivate staff:
  - a) Coaching – consistent and formal coaching sessions with all staff on: service excellence, product knowledge, cross-selling, up-selling, the needs analysis process, negotiation, pricing and profitability.
  - b) Mentoring – to assist staff with career pathing, skill development, and ongoing learning.
  - c) Motivating – engage staff, develop and implement branch campaigns, and reward and recognition programs.
- Identify, solicit, and close sales opportunities; offer appropriate Servus products and services to members in response to stated needs, as well as in response to clues indicating unstated needs.
- Understand Financial Planning concepts, provides financial advice to our members and facilitate the delivery of qualified Wealth Management referrals to the appropriate Wealth Management Specialist/Planner.
- Protect our member's financial well being through the delivery of our portfolio of Insurance products.
- Achieve or exceed assigned sales and referral goals. Enthusiastically participate in, and assist in the creation of corporate and branch campaigns.
- Responsibilities also include preparing accurate and complete documentation, processing account changes, and handling member inquiries in a timely and efficient manner while taking every opportunity to enhance our relationship with our members.
- Acquire knowledge of commercial lending and the corresponding products and services available to enhance our relationships with our commercial and agricultural members. Build member confidence, loyalty, and trust through courtesy, the presentation of customized financial solutions and referrals to our Business Banking Centers and Cash Management Services.
- Provide competent and courteous service to staff and members at all times in a timely, friendly, and professional manner.
- In collaboration with the Branch Manager effectively deal with all member concerns, conflicts and complaints. Educate and Empower employees to fully utilize our "I Make it Great program".
- Acquire full knowledge of our Mission, Vision and the supporting statements and then demonstrate Servus Credit Union core values in all actions.
- Other duties as assigned

## Financial Results

- In conjunction with the Branch Manager, monitor and ensure branch goals are met or exceeded in the following areas:
  - Loans
  - Deposits
  - Insurance Participation
  - Other Income
  - MasterCard Sales
  - Membership

- Delinquency
  - Mutual Funds
  - Operating Efficiency
  - Profitability
  - H.R. Efficiency
  - Products per Member
  - Referrals: Wealth Management, Business Banking and Johnson Insurance etc.
- Assist Branch Manager with the development of branch budgets/goals and monitor/report results to date to the branch staff.
  - Take appropriate action as necessary to meet set budgets and goals.

### Human Resource Management

- ABMs provide support, guidance, and training to all co-workers as necessary to ensure performance improvement and cohesive teamwork. ABM II's lead by example and act as a positive role model for all employees.
- Evaluate employee developmental opportunities and provide effective coaching, support, and technical training.
- Completes quarterly performance reviews for each direct report with a focus on skill development.
- Maintain a professional appearance, an organized, safe, and professional work environment.
- Motivates employees through the effective development and implementation and of reward/recognition programs.
- Holds weekly staff meetings that keep employees informed and include an effective business development and service component.
- Treats employees with dignity and respect and fosters a competent, positive, and expressive culture.

### Risk Management

- Ensure that staff adheres to policies, procedures, compliance, and loss prevention guidelines to mitigate the risk of loss to the Servus.
- Take necessary action on issues or concerns arising from the annual audits.
- Ensure necessary due diligence is taken to support the accuracy of all member transactions.
- Make recommendations and refer loans/mortgages outside of assigned discretionary limits to the appropriate level of authority. Process credit applications diligently, undertaking thorough investigations. Approve loans/mortgages within assigned limits for other employees.
- Adhere to policies, procedures, and loss prevention guidelines to mitigate the risk of loss to the Credit Union. Assists in the management of delinquent accounts and strives to bring accounts current in a timely manner.

### KEY EFFECTIVENESS SKILLS:

### **Interpersonal/Communication**

- Builds and sustains effective working relationships between staff, members, management, and community.
- Builds member and employee commitment to the success of our credit union
- Communicates clearly and concisely.
- Effective oral, written communication and listening skills
- Deals with conflict positively and supports others to resolve differences.
- Ability to engage, influence, negotiate, and motivate people.
- Basic public speaking skills/facilitation skills.
- Maintains a positive relationship with support departments.

### **Leadership**

- Build capability for change in other and demonstrate a positive attitude toward change.
- Recognition of and respect for people's diversity and individual differences.
- Coach, mentor, develop, influence and motivate employees.
- Facilitate interaction among people.
- Develop strategies to improve team, individual and credit union performance.
- Take responsibility for personal actions and the actions of others.
- Demonstrates integrity, credibility and prudent judgment

### **Managing Change**

- Participate in continuous learning and development.
- Ability to balance work and home responsibilities.
- Effective organization and time management skills.
- Understanding of the change management process; lead changes as they relate to our strategic direction.
- Ability to plan and implement changes.

### **Problem Solving**

- Identify problems, discover plans or patterns, reach conclusions, and evaluate action in relation to organizational development/department operations.
- Ability to recognize when a problem requires escalation to a Branch or Regional Manager.

### **Decision Making**

- Ability to make sound decisions based on policies, procedures and experience.
- Setting objectives, and implementing a plan.

## Teamwork

- Lead in team development and in identification of team roles, responsibilities and goals.
- Lead project teams and ensure collaborative relationships.
- Provide focus and direction.
- Recognize and celebrate team successes.
- Lead in development of strategies to improve team and individual performance.
- Empower team members to make decisions within the scope of their position.

## Innovation/Creativity

- Present new ideas that have productive outcomes (results in the generation of practical applications or development of new programs, policies and procedures).
- Push the limits of knowledge and ability to identify and create innovative ideas/solutions.

## Preferred Qualifications:

This position is a natural progression from the ABM I position. All courses required for the ABM I position are required for this position. Prior retail banking and credit assessment experience is essential. Completion or enrollment in a mutual fund course (IFIC/CSC), and/or Financial Planning program (CFP/PFP)

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If you are interested in applying for this position please submit your resume to:

Servus Credit Union Ltd.

**Sandi Unruh, Human Resource Specialist**

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