

**Radifi Credit Union**  
Structured Compensation - Job Description  
**Member Success Manager**

Data Year: 2026

Prepared On: 04/03/2026

---

Department:	000360-Retail Ops & Sales	Grade:	
Reports To:		Classification:	Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	06/05/2025
		Revised Date:	11/24/2025

**Role:**

Responsible for directing and administering the sales, service and operational efforts of a retail branch ensuring the branch meets organizational growth, sales and service goals. Responsible for generating new revenue opportunities in and around the existing branch market. Ensures established policies and procedures are followed. Oversees the full range of services to members and prospective members. Through targeted sales goals, works to deepen existing relationships with members and new members.

Promotes service delivery excellence and actively coaches associates to deliver 'awesome' service. Responsible for successful implementation of promotional campaigns and product initiatives at the branch level. Actively participates in community and business development initiatives, and monitors branch performance to ensure the branch meets organizational growth and service goals.

Has managerial responsibilities over a retail branch. Manages, coordinates and reviews the work of assigned staff. In conjunction with HR, manages employee status changes, conducts performance evaluations and salary reviews for assigned staff, and applies company policy. This role has limited supervision and inspection of work. The position is designed to produce financial or strategic results that are expected to have an impact on current organizational results.

**Essential Functions & Responsibilities:**

- E Coaches staff on their sales and service skills to motivate others in striving to achieve goals, adhering and executing on the Credit Unions “Awesome Sales & Service Program.” Develops employees’ skills in the Credit Union’s preferred way of selling, coaches on sales strategies and tactics, professionally handles non-performance, and conducts effective 1-1 sessions.
- E Work with HR and retail leaders to interview, hire and onboard new associates. Support the ongoing training & development of associates by directing job assignments, monitoring staff performance, coaching, counseling, training, assuring compliance with regulatory requirements.
- E Completes orientation of new employees in overall branch procedures. Appraise performance and provide recommendations for staff compensation, promotion, and termination as appropriate. Hold branch staff accountable to performance objectives and Retail Sales & Service expectations.
- E Advocates for and advances the digital readiness of branch staff to increase adoption and utilization of the Credit Union’s digital services among the team and membership.
- E Generates new revenue opportunities for the branch by providing guidance on potential new products or solutions based on member and consumer feedback; along with controlling branch expenses to increase its overall profitability.

**Radifi Credit Union**  
Structured Compensation - Job Description  
**Member Success Manager**

Data Year: 2026

Prepared On: 04/03/2026

---

- E Achieves monthly/annual goals based on annual budget.
- E Acts as the branch “business owner” to enhance bottom-line performance through business development, and increasing revenue through sales, service and relationship building; along with controlling expenses and improving efficiency of the branch.
- E Maintains knowledge of credit union products and services, as well as knowledge of the industries or market areas served. Keeps abreast of current developments and market trends, to further identify and service member needs, including commercial needs.
- E Refers sales opportunities to other departments or Credit Union affiliates in support of established corporate objectives.
- E Conducts quality, weekly sales meetings and huddles to discuss goals and action plans to meet monthly branch assigned goals. Takes proactive action to influence retail behaviors events or to achieve goals. Ensures adherence to Organizational Service Standards and effective execution of Retail Behaviors.
- E Obtains all needed information for a commercial loan request through member interviews, site visits, financial information, and third-party references.
- E Participates in community events to represent the Credit Union (including after-hours and occasional weekend events). Performs weekly business development activities to increase and grow the branch membership base. Proactively tracks pipeline of sales prospects and reports out on activity with an emphasis on results and membership growth.
- E Assists in driving the success of other business lines in the credit union that rely on referrals to grow such as Investment Services, Business Services, and Mortgages. Responsible for overall branch performance in referral results.
- E Assists in managing the overall recruiting and hiring process through participation in the selection of candidates to build future branch leaders. Participates in job fairs and career events with HR.
- E Work with Business Services Department to manage and develop local commercial business market. Delivers commercial credit union products and services within an assigned market. Responsible for meeting assigned commercial lending goals in addition to assigned branch goals.
- E Works to maintain and enhance Credit Union reputation with members, prospects, referral sources, and community-based organizations.
- E Work outbound calling campaigns to assist assigned branch in meeting sales goals.
- E Maintain quality assurance standards for all member interactions.
- E Performs other job related duties as assigned.
- E Must comply with all company policies and procedures, applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.

**Radifi Credit Union**  
Structured Compensation - Job Description  
**Member Success Manager**

Data Year: 2026

Prepared On: 04/03/2026

---

**Performance Measurements:**

1. A separate scorecard is maintained for the department.

**Knowledge and Skills:**

**Experience** Minimum of five years of similar or related experience, including time spent in preparatory positions. Proven leadership experience with a sales & service focus in a bank or credit union required.

**Education** (1) A two-year college degree, or (2) completion of a specialized certification or licensing, or (3) completion of specialized training courses conducted by vendors, or (4) job-specific skills acquired through an apprenticeship program/prior work experience. Degree preferred in business, finance, accounting, or a related field.

Must obtain and maintain NMLS certification and needed insurance licenses.

**Interpersonal Skills** Work involves extensive personal contact with others and is of a personal or sensitive nature. Motivating, influencing, and/or training others is key at this level. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary and often requires the ability to influence and/or sell ideas or services to others.

A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and is usually of a personal or sensitive nature. Work may involve motivating, influencing, or training others. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary and often requires the ability to influence and/or sell ideas or services to others.

**Other Skills**

- Excellent communication, problem solving, and decision-making skills to effectively resolve member and employee issues.
- Balance team and individual responsibilities.
- Strong supervisory and leadership skills required to manage, motivate, and develop employees.
- Uphold confidentiality and customer privacy in all situations.
- Proactively seeks solutions that benefit the member and the Credit Union while exhibiting sound and accurate judgment.
- The ability to work independently and the ability to work within a team is required.
- Ability to use the Internet, Outlook, word processing and spreadsheet software and position specific software as required.
- Strong technology skills are needed.
- Ability to interact effectively with clients and other internal departments is required.
- Strong attention to detail and the ability to work as part of a team is required.

**Physical Requirements** Is able to bend, sit, and stand in order to perform primarily sedentary work with limited physical exertion and occasional lifting of up to 50 lbs. Must be capable of climbing /

**Radifi Credit Union**  
Structured Compensation - Job Description  
**Member Success Manager**

Data Year: 2026

Prepared On: 04/03/2026

---

descending stairs in an emergency situation. Must be able to operate routine office equipment including computer terminals and keyboards, telephones, copiers, facsimiles, and calculators. Must be able to routinely perform work on computer for an average of 6-8 hours per day, when necessary. Must be able to work extended hours or travel off site whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to complete basic mathematical calculations, spell accurately, and understand computer basics. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Work Environment The noise level in the work environment is usually moderate.

**This Job Description is not a complete statement of all duties and responsibilities comprising the position.**

---

Printed Employee Name

---

Date

---

Employee Signature