

Radifi Credit Union
Structured Compensation - Job Description
Member Success Supervisor

Data Year: 2026

Prepared On: 04/20/2026

Department:	000360-Retail Ops & Sales	Grade:	
Reports To:		Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	02/12/2026
		Revised Date:	04/20/2026

Role:

RadiFi Credit Union is seeking a Member Success Supervisor to be responsible for supporting the branch in meeting team and individual goals. Supports Management by assisting with coaching the branch team to effectively execute sales & service to members. Act as the Member Success Manager when the manager is out of the office attending business development events or on vacation.

Essential Functions & Responsibilities:

- E Interviews members and potential members and presents RadiFi Credit Union products and services that meet the needs of the members financial success.
- E Oversee Member Success Advocate operations to assure proper compliance is being followed in cash management.
- E Be a mentor for all Member Success Advocate levels in cross selling techniques and applying RadiFi service and sales standards. Model required behaviors in every interaction with the member.
- E Assist in providing training and coaching as needed to help the branch achieve it's strategic growth and assist in developing the branch's strategic growth plan. This includes the coaching of the Member Success Advocates to assure they are meeting assigned cross sell goals.
- E Attend outside business development and sales events with the Retail Leadership as assigned.
- E Act as a Member Success Lead in the absence of that position. May be asked to assist at other branches in this capacity in the event these positions are vacant or an extended period of absence.
- E Follow up with members to obtain needed deposit documents to complete the account opening or closing process when needed.
- E Assist with member inquiries and escalations regarding debit card items, debit card fraud and dispute requests, stop payment requests, unauthorized ACH requests, statement review, member balancing assistance, deposit product rate review, name record file maintenance items, online banking items, and IRA withdrawals and maintenance.
- E Open new membership accounts to include consumer and business memberships.
- E Possess a strong understanding of credit reports and consumer lending documentation.
- E Assist in the growth of business lines that require referrals to grow such as Investment Services, Mortgages, and Business Services. Meet assigned referral goals and assure Member Success Advocate staff is meeting assigned goals.

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- E Be an expert in all of our online product offerings, assisting members with the creation and maintenance of their online profiles.
- E Have the ability to solve complicated issues by providing first level problem solving skills.
- E Act as the branch subject matter expert on all deposit products.
- E Assist with outbound calling campaigns, monitor effectiveness and participate in calling efforts.
- E Administrative duties as assigned to include quality assurance of new accounts and the scanning of any documentation.
- E May be responsible for opening and closing of safe deposit box if branch location offer this service.
- E Act as a branch notary for members.
- E Attend meetings and training sessions as assigned. Performs other job related duties as assigned.

Performance Measurements:

1. A separate scorecard is maintained for the department.

Knowledge and Skills:

- Experience Minimum of two years of similar or related experience, including time spent in preparatory positions. Must maintain your NMLS license and any insurance license 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.
- Interpersonal Skills Work involves much personal contact with others inside and/or outside the organization for the purpose of first-level conflict resolution, building relationships, and soliciting cooperation. Discussions involve a higher degree of confidentiality and discretion, requiring diplomacy and tact in communication.
- 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 desired. Ability to interact effectively with clients and other internal departments is required. Strong attention to detail 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 /

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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