Radifi Credit Union

Structured Compensation - Job Description

Member Success Advocate I

Data Year: 2026

Prepared On: 06/29/2026

Department:	000360-Retail Ops & Sales	Grade:	
Reports To:		Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	04/15/2025
		Revised Date:	02/03/2026

Role:

Serves as a resource within the branch network for new and existing member accounts, along with teller transaction needs. Maintains extensive knowledge of all products and services to promote, refer and cross sell through a consultative needs-based approach. Perform a broad variety of member service and account opening processes. Follows member service procedures and standards to ensure consistency and the highest quality service is met. Develops extensive knowledge of all Credit Union deposit products/services.

Essential Functions & Responsibilities:

E	Consistently models RadiFi Credit Union Service Standards and Retail Behaviors standards in every interaction. Responsible for greeting members, representing the Credit Union to the member in a courteous and professional manner, providing prompt, efficient, and accurate services in any area needed. Follow up with member with problem resolution issues to provide support or closure to member situations.
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.
E	Presents RadiFi products and services to meet member needs for financial success. Responsible for offering Credit Union products and services to members; must have adequate knowledge to present them in a positive, professional manner, answering any questions the member may have.
E	Attend outside business development activities and sales prospecting events as assigned, as well as conduct outbound calling campaigns and sales calls as assigned.
E	Apply Member Success Advocate training in cross selling techniques and applying RadiFi service and sales standards. Model required behaviors in every interaction with the member.
E	Learn all of the Credit Union's product offerings, assisting members with the creation and maintenance of their online profiles.
E	Fully functional as an opener and closer of the branch. Responsible for remaining at the office after closing, as necessary, to ensure all balancing is complete for the branch.
E	Assists members with service inquiries that include debit cards, fraud, and dispute request, stop payments, unauthorized ACH request, deposit product rate reviews, name record file maintenance items, online banking and IRA withdrawals and maintenance.
E	Assist with maintaining, securing, and balancing cash machines not limited to ATM’s, cash recyclers, cash dispensers, and all work involved in transactions; including monetary transactions behind the Service Line. Responsible for the decision on accepting negotiable instruments for cash, deposit or payment or seeking approval when needed.

E	Thoroughly knowledgeable on all digital products and services and possess the ability to competently explain and assist members in the setup and use.
E	Maintains a positive team environment by cooperating willingly with other employees who request assistance and requesting assistance also if needed.
E	May be responsible for opening and closing of safe deposit box and provide Notary Services for members.
E	Attend all meetings and training sessions as assigned.
E	Performs other job-related duties as assigned.
E	Minimum Performance Standards: 1. All members are to be greeted in a prompt, courteous, and professional manner and welcomed to the Credit Union office following service standards. 2. Must effectively listen to solve member problems and serve their needs. 3. Must thoroughly and professionally explain the feature and benefits of all Credit Union products and offer awesome service as measured by the established service quality standards. (Mystery shops and surveys) 4. Responsible for maintaining sales and service standards at an acceptable level as established by the Credit Union and measured by referral and/or sales results on scorecard. 5. Maintains acceptable sales and service performance standards as measured by mystery shops, scored observations and coaching sessions. 6. Strives to exceed goals assigned. 7. Must be proactive to influence events or achieve goals. (Making outbound sales calls) 8. Required to follow the attendance guidelines outlined in the Associate Handbook, arriving at work on or before the scheduled work time. 9. Must follow all policies and procedures established by the credit union.

Performance Measurements:

1. A separate scorecard is maintained for the department.

Knowledge and Skills:

Experience	Six months to two years of similar or related experience.
Education	A high school education or GED.
Interpersonal Skills	Work involves contact with persons beyond immediate associates regarding routine matters for the purpose of giving or obtaining information which may require some discussion. Outside contacts take the form of service to the public (members or vendors), requiring ordinary courtesy in providing assistance and information.
Other Skills	Able to operate a 10-key calculator, typewriter, and computer keyboard. Proficient in Microsoft products. The ability to learn new systems and adapt quickly to changing technology. Valid drivers license 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 / 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.