



## JOB DESCRIPTION

POSITION TITLE: Business Development Representative

REPORTS TO: Business Development Manager

EFFECTIVE DATE: January 1, 2022

FLSA STATUS: Full-time, Non-Exempt Hours: 40

EEO CATEGORY: Sales Location: Queensgate

### **POSITION PURPOSE:**

Responsible for building and maintaining business relationships for COPFCU. Participates in all aspects of the sales and business development cycles. Identifies and pursues sales opportunities, makes sales presentations, prospects new business partner relationships, and solicits new member accounts. Coordinates closely with other departments (Member Service & Loans) to ensure that products and services are opened/delivered in a timely manner. Develops and nurtures relationships with existing partner agencies and schools. Projects and maintains COPFCU's professional image. Keeps supervisor aware of area activities and significant challenges.

### **I. PRIMARY RESPONSIBILITIES:**

Cultivate new and maintain existing relationships for all eligible agencies/professions including public school districts; police and law enforcement; firefighters; government employees (city, county, state and federal); employees of entities receiving public tax funds, etc. Promotes products and services to these groups. Plans and implements events to promote COPFCU and its products and services.

### **II. ESSENTIAL FUNCTIONS:**

- Responsible for effectively developing sales opportunities for COPFCU.

- Maintains in-depth knowledge of products and services.
- Leverages current member relationships to further expand business development/sales opportunities at all levels.
- Conducts sales presentations. Utilizes all aspects of the sales process to secure expanded accounts.
- Ensures that all sales and business development interactions are professional, effective, and mutually beneficial to both the client and COPFCU.
- Serves as chief liaison with the community by participating in activities whenever deemed beneficial to the credit union (golf outings, festivals, meetings, etc., some of which may fall outside regular business hours).
- Coordinates with marketing on printed/e-mail marketing materials for business development purposes.
- Develops contact list of current/potential new agencies, schools and other organizations that may utilize COPFCU's products and services.
- Create and maintain an up-to-date tracking tool for roll calls and sit-ins.
- Schedules appointments with existing groups weekly.
- Visits prospective members and agencies to present information on all available products/services weekly.
- Responsible for community outreach including but not limited to, agency visits, lobby displays/promotions.
- Assists with planning and coordinating annual and special events or seminars.
- Delivers holiday gifts to business members.
- Creates and maintains a daily activity log. Tracks and analyzes results of each visit and reports results to Supervisor (Monthly).
- Assists the marketing department as needed and handles member inquiries about promotional and marketing programs.

- Assists with new accounts and ensures member request is fulfilled in a timely manner.

### **III. QUALIFICATIONS AND REQUIREMENTS:**

- Education/Certification: Associates or bachelor's degree in marketing, business, or a related field preferred, or an equivalent combination of training and experience.
- Required Knowledge: Knowledge of bank/credit union sales channels, target marketing and promotions strategies. Knowledge of the financial services competitive environment and industry challenges.
- Experience Required: Two or more years of sales/business development experience, preferably with a focus in banking/financial services.
- Skills/Abilities:
- Outgoing demeanor.
  - Strong member service skills.
  - Excellent presentation, public speaking and writing abilities.
  - Professional appearance.
  - Works well on a team.
  - Able to use all related hardware and software.
  - Valid driver's license.
  - Flexibility in schedule is required due to the meeting time of certain groups/agencies (as early as 6:00 am; as late as 9:00 pm).

### **IV. BEHAVIORAL COMPETENCIES**

- 1) Core Competencies:
  - o Member Focus (internal and external): Builds member confidence, is committed to increasing member satisfaction, sets achievable member

expectations, assumes responsibility for solving member problems, ensures commitments to members are met, and solicits opinions and ideas from members.

- Dependability: Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, and meets attendance/punctuality requirements.
- Integrity/Ethics: Deals with others in a straightforward and honest manner, is accountable for actions, maintains confidentiality, supports company values, communicates accurately and timely.

## 2) Job Specific Competencies:

- The position requires an individual who can maintain composure in a variety of situations.
- Teamwork: Works together toward a common goal.
- Communication: Possesses ability to convey information in a professional, precise, accurate, and easy-to-understand manner.
- Job Knowledge: Understands duties and responsibilities, has necessary job knowledge, has necessary technical skills, understands company mission/values, keeps job knowledge current, is in command of critical issues.

## **V. WORK ENVIRONMENT/PHYSICAL DEMANDS**

- Work is performed in a variety of environments due to the nature of the position and meetings/events that are attended.
- Must have the ability to sit or stand for extended periods of time throughout an eight-hour period.
- Must be able to lift as much as 35 pounds.

Any other duties or responsibilities management deems necessary as part of your position.

*COPFCU is an Equal Employment Opportunity (EEO) employer and does not discriminate on the basis of race, color, national origin, religion, gender, age, veteran status, political affiliation, sexual orientation, marital status or disability (in compliance with the Americans with Disabilities Act) with respect to employment opportunities. Job descriptions are not intended and do not create employment contracts. COPFCU maintains its status as an at-will employer.*