



## Job Profile

<b>POSITION:</b> Senior Manager, Branch Operations	<b>INCUMBENT:</b>
<b>DEPARTMENT:</b>	<b>DATE:</b>
<b>REPORTS TO:</b> Director, Member and Employee Experience	<b>SUPERVISES:</b> Branch Manager (six), Telephone Receptionist

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### Position Summary:

Reporting to the Director, Member and Employee Experience, the *Senior Manager, Branch Operations* is responsible for managing, directing, and coordinating the operations, business development and member retention efforts of the six branches. The successful incumbent acts as a catalyst moving the teams to action as the teams deliver quality financial products and services to current and prospective members and in so doing, achieving branch sales and service targets.

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### Key Result Areas:

Leadership; Branch Operations/Credit Union Support; Financial Management; Member Relations; Lending/Deposit Portfolio Management; Human Resource Management; Sales, Marketing and Promotion

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### Specific Accountabilities:

- Manages overall branch operations including both deposit and loan portfolios; and, ensures branch operations are efficient, effective and compliant with all applicable regulations and sound business practices.
- Assists members with their full range of financial needs including day to day banking, borrowing or savings goals.
- Coaches and develops staff in relationship building, needs satisfaction sales techniques and service excellence.

- Conducts business development activities, by establishing and maintaining effective contacts within the membership to aid in the development of the branch and enhance ERCU visibility within the communities we serve result in generating more referrals, members and overall business.
- Promote, motivate, and inspire service excellence and commitment to learning with a primary focus on *Knowing Your Member, Adding Value, and Providing Wise Advice*.
- Develops performance standards and goals and conduct's reporting employees' performance reviews, implements training and development programs and identifies opportunities for professional growth.
- Develops and implements the Business and Tactical Plans for the branches; and monitors branch progress against established deposit and lending objectives. Provides ongoing feedback, recommendations, recognition as appropriate and develops and implements corrective measures as required.
- Promotes the credit union's image in the community through attendance and participation in community organizations and events. Makes public presentations at events such as schools, colleges, universities, local service groups, job fairs, etc.
- Ensure branch profitability is maximized by eliminating unnecessary expenses, collecting appropriate revenues, pricing loans in accordance with risk levels, and pricing deposits according to prevailing directives.
- Ensure that your branch employees are fully knowledgeable on products, policies and procedures applicable to each employee.
- Ensures that Branch images are favorable, reflecting a sound and secure financial institution that employs prudent housekeeping procedures, safety measures, and provides a pleasant atmosphere for members, including privacy, confidentiality, and ease of use.
- Completes other projects and duties as assigned.

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### **Minimum Hiring Qualifications and Experience:**

The Senior Manager, Branch Operations will have successfully completed a Bachelors Degree with an emphasis in Business or Commerce plus have six to nine years relevant experience, including 5-10 years supervisory experience, in a financial institution; or equivalent combination of training and experience in credit management.

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### **Competency Requirements:**

To perform the job successfully at 100% competency, the incumbent must demonstrate the following competencies:

**Technical Competencies:**

• Written communications	• Monitoring and compliance
• Work planning and management	• Marketing
• Wealth management	• Managing the workforce
• Strategic management	• Lending
• Software proficiency	• Knowledge of products and services
• Sales	• Knowledge of policies and regulatory environment
• Optimizing risk	• Knowledge of financial principles
• Operation of specialized equipment and technology	• Decision making
• Budget and expense management	• Business acumen
• Balance sheet management	

**Behavioural Competencies:**

**Core Organizational**

- Change Leadership - Follows through on change initiatives
- Building Relationships and Partnerships - Collaborates with stakeholders on an ongoing basis
- Listening, Understanding and Responding - Effectively uses empathy
- Results Orientation – Sets and works to meet challenging goals
- Team Leadership - Positions self as the leader
- Developing Others – guides, supports and feedback to encourage ongoing development
- Strategic Orientation - Integrates goals with operations

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**Probationary Period:**

The probationary period for this position is six months.

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**Signatures:**

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**Employee**

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**Date**

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**Manager**

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**Date**