

**Advanz Federal Credit Union**  
**Structured Compensation - Job Description**  
**Business Development Officer**

Data Year: 2022

Prepared On: 05/25/2022

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Department:	Business Development	Grade:	
Reports To:	Senior Vice President	Classification:	Non-Exempt
Supervises Direct:		Supervises Indirect:	
Approved By:		Effective Date:	12/09/2019
		Revised Date:	06/01/2020

**Role:**

Develops and maintains the Marketing Plan; is responsible for marketing membership to local companies and groups; is the primary liaison between the credit union and existing member companies and groups; and maintains good member relations.

**Essential Functions & Responsibilities:**

- N 50% Self-motivated to call on area businesses to discuss the Advanz FCU difference.
- N 20% Is knowledgeable of marketing techniques along with marketing rules and regulations.
- N 15% Is knowledgeable of Advanz products and works to cross sell them.
- N 10% Is capable of making sales presentations to new and existing member groups.
- N 5% And such other responsibilities as set forth in policy or assigned from time to time by Senior Management.

**Performance Measurements:**

1. Receives members in person or by telephone; determines the nature of the member's business and either transacts the member's request or refers him/her to the suitable staff person.  
Provides, in person or by telephone, routine information concerning Credit Union services or policies, including: what is a credit union; eligibility for membership; how to apply for membership; type of accounts available; insurance coverage for shares and loans; basic loan policies; interest rates charged on loans; how dividends are computed on shares; how to start, change, or stop a payroll deduction; the locations, office hours, and telephone service.
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3. Maintains the confidential nature of all member transactions, information, and other related operational data as required.
4. Attends meetings, educational and training sessions, as required, and maintains credit union equipment in proper working order.
5. Is capable of, and as the situation may warrant, will perform the duties of all Member Service Representatives.
6. Develops a list of target companies and groups, and coordinates with the Sr. Vice President marketing efforts to these groups.
7. Arranges and conducts "on-site" presentations; follows-up with "on-site" enrollments.
8. Makes "cold calls" to local companies and organizations.
9. Makes periodic visits to existing sponsor companies and groups; arranges and conducts "on-site" re-enrollments.
10. Maintains files to assure proper follow-up with existing sponsors and potential new groups; maintains a monthly mileage report.

11. Reviews such daily and monthly reports on savings/lending activities to assist in marketing presentations; prepares charts/graphs, and such other reports required for strong marketing efforts.
12. Attends events such as local Chamber of Commerce meetings, trade shows, trade group meetings, and community events to represent the credit union.
13. Assists Senior Management in special marketing endeavors.
14. Works closely with the department vice presidents to achieve the marketing plan and related productivity goals.
15. Prepares monthly reports as requested by the President/CEO or the Sr. Vice President.
16. Performs such other duties as may be assigned by his/her supervisor which are commensurate with his/her position and in the best interest of operations.
17. Follow the Bank Secrecy Act Policy and Procedures.

**Knowledge and Skills:**

- Experience      Three (3) years ‘work experience, preferably in a financial institution marketing
- Education      At least two (2) years’ post high school education in an accredited institution with an emphasis in marketing
- 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      The person holding this position is required to have complete knowledge of Credit Union policies and procedures; thorough knowledge of marketing techniques; the ability to make public presentations, to organize work, to handle large volume of detail, and to instruct others; mental alertness; neatness in appearance; punctuality; dependability; and a cooperative attitude in relations with members and other employees.
- Physical Requirements
- Work Environment

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

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Printed Employee Name

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Date

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Employee Signature