



## Personal Relationship Representative – Streamwood, IL

### **Well, well, well. Look who it is...**

We've been waiting for you to swing by and check us out. We have some jobs here at Andigo that could be a great fit for you, since you have a hankering for a fast-paced, get-it-done workplace and a passion for helping people, just like the rest of our team.

But before we get into all that, a little about us. While you may not have heard our name – say it with us, “Andigo sounds like indigo” – we've expanded to 40,000 members and lots of sponsor organizations (businesses with a bank-at-work perk for their employees). Good folks from the greater Chicago area and across country.

Did you catch that? That one word you won't see big banks use? “Members,” that's right. Andigo is a not-for-profit, member-owned credit union. We exist for one and only one reason: to help our members achieve their goals whenever, wherever they go. Because we're not a bank, we don't drive up profits just because shareholders demand it. Instead, we focus on driving up member happiness through low loan rates, high deposit rates and low or no fee products and services. Makes banks seem like kind of a bummer, huh? That's why we need to get the word out about all of the great opposite-of-bummer things we're doing for our members here at Andigo.

That's why we need you.

You're someone who sees a wrong and rights it. You take work seriously but not yourself. You want to surround yourself with other highly motivated, highly fun people who want to grow Andigo. You want to prove that when we set a goal to make a difference in our members' lives. Together we truly can. That's not easy, but you already know that because you're a person who loves a challenge as much as you love top compensation and A+ benefits for your hard work.

We think you belong here, do you? Thought so. Let's go!

### **Summary**

The Personal Relationship Representative (PRR) is responsible for delivering an exceptional member experience, especially as it relates to developing and enhancing member relationships. The PRR assesses member needs and uses a consultative approach to building business by providing the products and services necessary to improve the members' financial lives and ensure ease with doing business with Andigo.

## Hours

This position is a 40 hour work week, with some occasional overtime. Hours could range from 8:00 a.m. to 6:00 p.m. Monday through Friday and some Saturdays from 8:00 a.m. to 2:00 p.m.

## Essential Duties and Responsibilities

- Provide exceptional knowledge of consumer products and services and be able to identify opportunities to offer these at every appropriate opportunity, whether it be at the point of building the member relationship or cross-selling to enhance the relationship.
- Possess the knowledge of all remote channels, to include how to enroll for these services, trouble-shoot issues and when to offer them to members. These channels include online banking, mobile banking, bill payment, voice response unit and shared branching.
- Open new accounts for both consumer members and business clients. Adhere to all required compliance guidelines and Andigo processes and procedures to ensure all audit and quality control reviews are passed with 100% accuracy.
- Identify opportunities to refer loans to the real estate, lending sales and business services teams. Be the liaison, as needed, between the member and the lending representative. Possess proficiency in all loan types, to include auto, home equity, personal, first mortgage – along with other ancillary services, such as CU Realty, GAP and MRC products.
- Identify opportunities to refer members to the wealth management advisors. Be a leader on the branch team for meeting this goal and coaching peers for success.
- Assist with the setup of new business members with ACH payroll and payment services through online banking.
- Meet and/or exceed established sales and referral goals; enter information into Andigo TIP portal for tracking purposes.
- Resolve member service issues and handle complex account issues. Maintain expert knowledge in fiduciary account set up, such as power-of-attorney, estates, trusts, representative payees and custodial accounts.
- Initiate complete and accurate loan applications from leads and identified opportunities.
- Partner with branch team and community development specialist to develop local campaigns and promotions geared toward generating new business for the branch.
- Proactively seek out and make recommendations for process improvements related to member service delivery.
- Participate in and support business development efforts, to include attending community events.

- Support member growth strategy by contacting perspective leads from business development events, generating sales results through marketing campaigns, call lists, and member referrals.
- Assist in the development and updating of branch policies and procedures.
- Train new MSRs, PRRs or other Andigo employees, as needed.
- Comply with all policies, procedures and regulatory banking requirements. Complete all necessary compliance and IT-related training courses.
- Assist with teller transactions, member service issues, safe deposit box support and any other branch support duties assigned by the supervisor or branch manager.
- Handle other duties as assigned.

### **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.

### **Education and/or Experience**

Requires a high-school diploma and a minimum of one year of sales experience and two years of customer service experience.

### **Technical / Interpersonal Skills**

- Positive attitude and the ability to build rapport in person and over the phone.
- Excellent written and oral communication skills.
- Ability to work in an organized manner in a fast-paced environment while handling multiple priorities simultaneously.
- Experience in consultative selling techniques and process with the demonstrated ability to listen well, understand individual circumstances, and make customized recommendations based on each individual situation.
- Pays close attention to detail with a high degree of accuracy.
- Ability to overcome objections by understanding member concerns and connecting them with personalized benefits.
- Orientation toward action and driving for results.
- Must be proficient in the use of Windows office products and the Internet.

### **Compensation and Benefits**

Andigo is proud to offer a comprehensive benefits package that includes medical, dental, vision and life insurance options. A generous 401(k) and vacation plans.



**EEO Disclaimer:**

Andigo is an Equal Opportunity Employer. We do not discriminate on the basis of race, religion, color, sex, age, national origin or disability.

**To apply**

**Please send your resume to Georgia Katsianis at [georgia@careerdevsavant.com](mailto:georgia@careerdevsavant.com)**