

Business Development Specialist

Reports to: Vice President of Marketing

Department: Marketing

Job Status: Non-Exempt

Supervisory Responsibility: None

The primary purpose of this position is to assist Health Advantage Federal Credit Union in achieving its vision to be the financial institution of choice among all eligible members and to provide programs and services that will enhance the lifelong well-being of our members.

Working as part of a team, the **Business Development Specialist** is directly responsible for helping coordinate and implement strategies and initiatives designed to increase membership and product penetration, represents the credit union at community and member events, and business development activities, builds and maintains strong client relationships and establishes new partnerships.

Main Duties and Responsibilities

- Collaborate with the Marketing Director to develop strategies to increase membership and product penetration. Identify new healthcare industry members by researching and creating business development opportunities and activities focused on increasing member and potential member awareness of the credit union's products and services. Track business development efforts and outcomes and present monthly reports to the Marketing Director (i.e., visits, calls, referrals, incentives, etc.). Maintain a list of healthcare businesses and their contacts and business development efforts. Maintain any advertising at healthcare business locations.
- Analyze market trends and demographic data concerning potential members, products, and services. Keep abreast of changing trends in the marketplace and the healthcare industry so that the credit union may react quickly.
- Attend and represent the credit union at external functions and community events. Assist with credit union promotions, branch openings, event sponsorships, special programs, community involvement and support. Encourage and maintain positive relationships with members and the community, through networking and communicating on a regular basis.
- Promote the benefits of the credit union through onsite presentations, membership drives and webinars for healthcare groups during their new employee orientations, staff meetings or other events. Conduct financial webinars, seminars and presentations to key employer groups, members, and youth including preparation of materials, PowerPoint and emails/mailings.
- Ability to build and maintain strong client relationships and establish industry partnerships. Maintain contact and continuously develop on-going relationships with healthcare industry representatives including onsite visits, written/phone/email, and other means and supply marketing materials in order to increase penetration.
- Develop and maintain proficiency in various software programs for production, design and tabulation of various business and community marketing pieces and research materials. This includes demonstrating a working knowledge of the company's programs for target market identification and promotion results tracking purposes.

- Assist members and new prospects with their financial goals by identifying and promoting products, loans and services to meet those needs. Distribute referrals to departments and follow-up on account requests received from healthcare industry groups.
- Assist area personnel and all other staff members as required, handling communications and follow-up professionally. Complete required reports and related documents promptly and accurately.
- Maintain an up-to-date and comprehensive knowledge of Credit Union products and services. Support the solutions program of the Credit Union.
- Social Media
 - Assist in creating engaging written and live content that resonates with HAFCU's target audience and aligns with the credit union's brand and mission.
 - Assist in monitoring social media channels and engage with users as appropriate by responding to comments and inquiries.
- Marketing Support
 - Assist the marketing team as needed, including website updates and communication pieces.
- Ensure that work area is clean, secure, and well maintained.
- Follow all Credit Union policies, procedures, legal and regulatory requirements, including, but not limited to, understanding of the compliance with the Credit Union's BSA/CIP/OFAC program. Keep members informed of Credit Union services and policies.
- Maintain and project the Credit Union's professional reputation. Maintain privacy of member account information.
- Meet Service Standard Expectations, providing extraordinary financial products at the highest level of service to the membership.
- Attendance at workplace is required.
- Ability to handle high levels of stress.
- Good personal skills.
- Good driving record.
- Other duties as assigned.

Competencies & Performance Measurements

To perform this job successfully, an individual should demonstrate the following competencies to perform the essential functions of this position.

- Ability to effectively multi-task and demonstrate a high degree of accuracy and attention to detail.
- Proficient knowledge to cross-sell all Credit Union products and services that are handled or promoted to ensure full use by members, including all related policies, procedures, rules and regulations.
- Must be organized and have the ability to prioritize while working in a fast paced environment.
- Maintain a professional and courteous relationship with members, staff, and vendors.
- Must be able to maintain confidentiality with employee and member personal information.

- Communication—the individual speaks clearly and persuasively in positive or negative situations, has excellent listening skills, can effectively respond to both verbal and written inquiries.
- Judgment—the individual exhibits sound and accurate judgment, makes timely decisions, and involves others as required and when needed.
- Problem solving—the individual identifies and helps to resolve problems in a timely manner and gathers and analyzes information skillfully.
- Quality management—the individual looks for ways to improve and promote quality and demonstrates accuracy and thoroughness.
- Planning/organizing—the individual prioritizes and plans work activities, uses time efficiently and develops realistic action plans.
- Security—the individual ensures procedures are observed to maintain appropriate levels of security.
- Safety—the individual observes safety procedures and uses equipment and materials properly.

Knowledge and Skills

- College degree in sales, marketing, or related field
- Ability to effectively present information in one-on-one and small group situations to other employees, members, and potential members.
- Excellent verbal and written communication and grammar skills
- One to three years marketing and/or public relations experience
- Proficiency with Microsoft Word, Excel, PowerPoint and Outlook.
- Social media experience, including but not limited to, Facebook, Instagram, and LinkedIn
- Project management experience
- Photography and video production and editing experience a plus
- An understanding of the principles of sales, marketing, and a background in creative writing and grammar is a plus.
- Strong computer and applications skills
- Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures, or governmental regulations.
- Ability to understand and apply financial concepts and to add subtract, multiply and divide in all units of measure using whole numbers, common fractions, and decimals.
- Ability to solve practical problems and deal with a variety of concrete variables in situations where standardization exists.
- Good working knowledge of word processing software, spreadsheet software, e-mail software, use of the Internet and the ability to learn internal use software.
- Occasional varying work schedules may be required to support department needs
- Team player with a positive attitude and flexibility
- Professional demeanor and personal accountability
- Other: The employee must be able to perform this position safely, without endangering the health or safety to him or herself or others. The employee in this position must be capable of effectively handling multiple concurrent tasks and is flexible in handling daily tasks as required.

Environment and Physical Activity

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The environment for this position is an open office that is clean and comfortable. It may include some minor annoyances such as noise, odors, drafts, etc. The employee is in a non-confined office-type setting in which he or she is free to move about at will.

The employee, in the course of performing this position, spends time writing, typing, speaking, listening, lifting (up to 40 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception, and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling, and reaching.

The employee for this position may operate any or all of the following: telephone, cellular telephone, copy and fax machines, calculator, imaging equipment, postage meter, typewriter, computer terminal, personal computer, related printers, and teleconferencing equipment.

This position also involves local travel in the Great Lakes Bay region, between branches, and occasional travel elsewhere.