



# Business Development Specialist

## Position Information

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Location: Cheyenne, WY

Code/ID: Not Entered

Department: Business Development

Job Classification: Exempt

EEOC Category: Administrative Support Workers

Asset Size: 2021 \$1B-\$2B

## Role

The Business Development Specialist will spend 80% of their time out of the office maintaining current relationships and growing accounts through member sign-ups, presentations, and in-person contact. About 20% of the time will be spent in the office conducting activities that contribute to the development of business for the credit union (e.g., telephone follow-ups). Initiate contact with potential organizations/employees through visits, mailings, and phone calls. Assist with new member growth through individual member contact via phone, e-mail, etc. Create new SEG partners and grow member relationships.

## Major Duties and Responsibilities

WEIGHT	DESCRIPTION	ESSENTIAL
25%	Assist members and new prospects with their financial goals by identifying and promoting products, loans and services to meet those needs. Open new accounts, disseminate referrals to departments and follow-up on account requests received from Select Employee Groups (SEG).	✓
25%	Build relationships with business partners to gain new member loyalty through SEG penetration with the foundation for a partnership in community involvement. Partner with the Public Relations and Marketing teams to effectively onboard and promote brand awareness.	✓
10%	Make informative and persuasive presentations to management, staff, established and prospective members, and outside organizations. Communicate and discuss complex ideas.	✓
10%	Organize and represent the credit union at community events, expos, business presentations, seminars, etc.	✓
10%	Maintain and organize company list, member representative files, mail list, SEG approvals and communication to staff. Track business development efforts and outcomes. Present monthly reports to the Business Development Sales Manager (i.e., visits, calls, referrals, incentives, etc.).	✓
10%	Contact current and potential employee groups by phone and in person to supply marketing material; work with client in order to increase new member penetration. Conduct regular sign-ups and presentations including preparation of material, expo display and mailings.	✓
10%	Collaborate with the Business Development Sales Manager to develop strategies to increase membership and product penetration. Ensure marketing material is developed on time by working in conjunction with marketing team.	✓

WEIGHT	DESCRIPTION	ESSENTIAL
—	Comply with all company policies and procedures, applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control.	✓

## Knowledge and Skills

### EXPERIENCE

A minimum of one year up to three years of similar or related experience, including preparatory experience.

### EDUCATION/CERTIFICATIONS/LICENSES

A college degree.

### INTERPERSONAL SKILLS

A significant level of trust, credibility and diplomacy is required. In-depth dialogues, conversations and explanations with customers, direct and indirect reports and outside vendors can be of a sensitive and/or highly confidential nature. Communications may involve motivating, influencing, educating and/or advising others on matters of significance.

## ADA Requirements

### PHYSICAL REQUIREMENTS

Perform primarily sedentary work with limited physical exertion and occasional lifting of up to 10 lbs. Must be capable of climbing / descending stairs in emergency situation. Must be able to operate routine office equipment including telephone, copier, facsimile, and calculator. Must be able to routinely perform work on computer for an average of 4-6 hours per day. Must be able to work extended hours whenever required or requested by management. Must be capable of regular, reliable and timely attendance.

### WORKING CONDITIONS

Must be able to routinely perform work indoors in climate-controlled private office with minimal noise.

### MENTAL AND/OR EMOTIONAL REQUIREMENTS

Must be able to perform job functions independently and work effectively either on own or as part of a team. Must be able to plan and direct the work activities of self and others. Must be able to read and carry out various complicated written and oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.