
Business Development Specialist

LOCATION: FORT COLLINS

Role

The Business Development Specialist will spend 80% of their time out of the office maintaining current relationships and growing business accounts through member sign-ups, presentations, and in-person contact. About 20% of the time will be spent in the office conducting mailings and making phone follow-ups. Initiate contact with potential company or community businesses/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 the financial relationships per members.

Major Duties and Responsibilities

- 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 employer groups.
- 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 Community Outreach and Marketing teams to effectively onboard and promote brand awareness.
- Collaborate with the Business Development Manager to develop strategies to increase membership and product penetration. Ensure marketing material is developed on time by working in conjunction with marketing team.
- Organize and represent the credit union at community events, expos, business presentations, seminars, etc.
- Maintain and organize company list, member representative files, mail list, SEG approvals and communication to staff. 8) Track business development efforts and outcomes. Present monthly reports to the Business Development Manager (i.e., visits, calls, referrals, incentives, etc.).

- Ability to make informative and persuasive presentations to management, staff, established and prospective members, and outside organizations. Must be able to communicate and discuss complex ideas.
- 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.
- Assist the Marketing Department in development of campaigns, member events and other initiatives including budget management.
- Must 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 & 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.