



<b>Job Posting Details</b>	Outside Workday Population: Member Services Agent
<b>Job Requisition</b>	R1807153 Member Services Agent (Open)
<b>Job Family</b>	Member and Teller Services
<b>Start Date</b>	2018-05-23
<b>End Date</b>	2018-06-07
<b>Primary Posting</b>	Non
<b>External Posting URL</b>	<a href="https://desjardins.wd3.myworkdayjobs.com/Desjardins2/job/Ottawa/Agent-ou-Agente---Services-aux-membres---Rockland_R1807153-1">https://desjardins.wd3.myworkdayjobs.com/Desjardins2/job/Ottawa/Agent-ou-Agente---Services-aux-membres---Rockland_R1807153-1</a>
<b>Description</b>	Desjardins Group is the largest cooperative financial group in Canada, and one of the largest employers in the country. It offers a full range of financial products and services and is home to a wealth of expertise in property and casualty insurance, life and health insurance, wealth management, services for businesses of all sizes, securities brokerage, asset management, venture capital, and secure, leading-edge virtual access methods.

#### **Job Level**

NV-03

The incumbent supports the needs of members and customers with respect to convenience products and services. He or she advises and assists members and customers in selecting and using automation solutions and various alternative channels. He or she transmits general information on Desjardins Group's service offer to members and customers.

#### **General Information on the Position**

Caisse populaire Trillium is a 26,500-member financial cooperative with deep roots in the community. It provides ongoing support for the social and economic well-being of community members. Its vision is to be the community's leading cooperative financial institution recognized for its community involvement, financial strength and role in creating a sustainable prosperity.

#### **Main Responsibilities**

- Advise and assist members and customers in selecting and optimizing their use of various available tools and alternative channels, fostering autonomy and promoting automation (e.g. ATMs, AccèsD Internet and telephone, Desjardins mobile services, Desjardins.com, as well as complementary channels such as the Student Service Centre and Desjardins Bank).
- Sell convenience products and services (e.g. Desjardins access card, Visa Desjardins card, AccèsD registration, fund transfers, account changes, traveller's cheques, authorized transit limit, inter-caisse authorizations, safety deposit boxes, cash orders). Perform the required transactions, and, when necessary, follow up with members and customers.
- Listen to members' and customers' needs in order to ensure their full satisfaction and identify sales opportunities, and, when appropriate, refer them to individuals who can meet their needs.
- As required, meet with members and customers to open accounts, following the process established by the Caisse.
- Support members and customers who have encountered fraud or irregularities (e.g. copied Desjardins access card, identity theft, phishing or any other issue related to the access card or Visa Desjardins card). Monitor and process transactions required for case settlements.
- Contribute to sales growth by taking part in various solicitation and referral activities.
- Ensure that activities are completed in a timely fashion and in accordance with prescribed

quality standards.

- Maintain the security of transactions and operations in accordance with current policies, practices and standards.

#### Qualifications

- High school diploma
- 2 years of experience in financial services or customer service

Other combinations of qualifications and relevant experience may be considered

- Knowledge of all counter and convenience products and services
- Knowledge of all Desjardins products and services aimed at caisse members and those offered by business centres, components, distribution networks/channels and as well as those of competitors
- Knowledge of integrating data into systems
- Knowledge of security measures, legal framework and internal controls
- Understanding of the philosophy and fundamentals of financial services cooperatives
- Knowledge of operating procedures related to convenience products and services and transactions
- Knowledge of service standards
- Learning on the fly
- Approachability
- Action oriented
- Customer focus
- Drive for results
- Professionalism and attention to detail

#### Other working conditions

- Number of jobs available :1

#### Job Family

Personal Services and Sales (G)

#### Work Location

Caisse Populaire Trillium Inc.

#### Trade Union

Non Syndiqué

#### Unposting Date

2018-06-6

#### Worker Sub-Type

Regular

#### Location

Ottawa

#### Time Type

Full time

#### Locations

#### Supervisory Organization

Dir Opérations et transactions assistées - Caisse Populaire Trillium Inc. (France Legault [C], Christine Villeneuve [C])