

Branch Manager

Job Title: Branch Manager	Department: Retail Banking Sales and Service
Reports to: Director of Sales & Member Experience	
Division: Oshawa	Date: June 27 th , 2022

Guides, directs, and coaches employees to deliver exceptional service to PCU members and prospects. Understands the needs of PCU members or prospects to provide sales and service in the best interests of the member. Advises members on products and strategies that meet their financial objectives. Identifies and makes referrals to other business groups. Supports sales and member service activities to meet strategic member experience and profitability goals in compliance with legal and regulatory requirements and the Credit Union's policies and processes.

- Ability to build strong relationships focused on providing exceptional member experience.
- Builds a culture of collaboration so that members are served by those best able to meet their financial goals.
- Builds interdependent high performing teams that collaborate across functional and operating groups to create the highest value for all stakeholders.
- Manage complex branch duties related to mutual funds, lending and compliance
- Regularly connects work to PCU's purpose, sets inspirational goals, defines clear expected outcomes, and ensures clear accountability for follow through.
- Ability to attract, retain, develop, and engage your team to enables career development of top talent.
- Monitor PCU business performance against business plan and implement actions to close any gaps.
- Grows the business by developing new opportunities and supporting member acquisition through multiple channels.
- Leading the overall success of the branch by maintaining and optimizing branch profitability.
- Creates innovative business development strategies, including collaborating with PCU partners to grow the business and maximize branch revenues, sales, and member satisfaction, and minimize operating losses.
- Recommends and implements solutions based on analysis of issues and implications for the business.
- Identifies emerging issues and trends to inform decision-making
- Leads through change ensuring all activities are compliant with governing regulations, internal policies, and procedures.
- Develops and maintains a network in the community to enhance the Credit Union's visibility and builds a strong referral source for new potential business.

Oshawa Branch
 322 King Street West
 Oshawa, ON L1H 7L1
 F | 905.728.8727

Bowmanville Branch
 221 King Street East
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T | 905.728.5187
 TF | 1.800.268.8771

- Build and participate in PCU's market profile through active involvement in our community with key industry associates, advocates, and members.
- Fulfills sales and service activities for the member in accordance with approved procedures.

Qualifications:

- 5 - 7 years of relevant experience and post-secondary degree in related field of study or an equivalent combination of education and experience.
- Previous supervisory or management experience.
- Mutual funds license required
- Branch Compliance Officer designation required or achieve within first 6 months of employment
- knowledge of retail banking products and services, competitive marketplace and trends in product offerings.
- In-depth knowledge of branch technologies, processes, and performance metrics.
- In-depth knowledge of applicable regulations, audit standards, and related policies, procedures, and directives.
- Knowledge and technical proficiency gained through extensive education and business experience.
- Collaboration & team skills - In-depth.
- Analytical and problem-solving skills
- Influence skills - In-depth.
- Data driven decision making

At PCU we are driven by a shared Purpose

As a member of the PCU team you are valued, respected, and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our members. We'll support you with the tools and resources you need to reach new milestones, as you help our members reach theirs.

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