

JOB DESCRIPTION

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| **Job Title: Dealer Relations Specialist I** |
| **Department/Group: Dealer Support** |
| **Reports To: Dealer Relations Manager** |
| **Status: Full Time** |

Clean Energy Credit Union is passionate about promoting clean energy to protect our environment and improve our economy. *Our focus is on providing clean energy loans that reduce the cost of living for members while also decreasing their environmental footprint. We envision a world where everyone can participate in the clean energy movement.*

**Primary Purpose of Position:**

This position plays a key role in the success of the Dealer Relations team, which is responsible for establishing and nurturing relationships with contractors, merchants, and dealers (“dealers”) that offer clean energy, energy efficiency, and energy saving products and services to the credit union’s members and prospective members. The Dealer Relations team also supports the credit union’s loan application process by reviewing the technical and risk merits of all clean energy projects that the credit union finances. This position will work closely with the Dealer Relations Manager, the VP of Strategy and Development, the Board Chair, the Operations team, and the Member Services team. The person in this position performs all duties according to established department procedures and adheres to Credit Union policies. This position may be eligible for hybrid or remote work.

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| Job Description |
| **Essential Functions:**   * Provide excellent service to members, dealers, and credit union staff. * Review and assess clean energy project documents and details that are submitted by dealers and their customers as part of the loan review process. * Take incoming inquiries and support requests from dealers via phone, email, and website. * Assist in the development and implementation of programs, processes, and products to build strong relationships with high quality dealers in the credit union’s dealer network. * Maintain contact information and relationship notes for each dealer in the credit union’s network. * Assist with the development, administration, and tracking of dealer satisfaction and customer satisfaction surveys. * Assist with reporting and analysis of credit union operations and financial performance. * Assist in the evaluation of new and existing energy-related technologies for possible inclusion in the credit union’s financing portfolio. * Maintain subject matter expertise and provide training to dealers on the credit union’s products, programs, procedures, online dealer portal, and other necessary software. * Seek opportunities to build the technical knowledge of fellow staff members. * Look for opportunities to educate credit union staff, dealers, and members on clean energy lending and products, programs, and benefits. * Maintain a thorough understanding of state and federal laws and regulations related to clean energy lending and credit union compliance including bank secrecy and anti-money-laundering laws. * Participate in new and on-going projects as requested by the Board Chair, VP of Strategy and Development and Dealer Relations Manager. * Support credit union staff with non-dealer needs as requested. |

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| Position Titles That Report to this Position |
| * Dealer Relations Manager |

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| Job Competencies |
| * **Detailed knowledge** of the credit union’s products, services, policies, and procedures. * **Sales Persuasion*-*** Gaining prospect, member, or dealer commitment to a product, service, or idea by using effective influence strategies. * **Service Excellence**- Taking actions and developing relationships necessary to meet and exceed member needs (includes relationships with members, coworkers, and external partners); holding self and others accountable for providing a positive member experience; using appropriate interpersonal skills to resolve difficult member situations and regain their confidence. * **Driving Innovation**- Creating an environment (culture) that inspires people to generate novel solutions with measurable value for existing and potential customers (internal or external); encouraging experimentation with new ways to solve work problems and seize opportunities that result in unique and differentiated solutions. * **In-depth knowledge** of the technologies that the credit union finances. * **Earning Trust-** Gaining others’ confidence by acting with integrity and following through on commitments while disclosing own positions; treating others and their ideas with respect and supporting them in the face of challenge. * **Driving for Results-** Setting high goals for personal and group accomplishment; using measurement methods to monitor progress toward goals; tenaciously working to meet or exceed goals while deriving satisfaction from that achievement and continuous improvement. * **Process Development** – Creating and improving procedures to increase work flow, efficiency, and outcomes. * **Attention to Detail** – Ensuring that information collected, provided, and/or evaluated is consistent with all related information available; holding to regulatory standards, recognizing that they exist to protect and honor members’ financial well-being. * **Data Analysis** – Gathering, manipulating, processing, and evaluating numeric data to guide credit union decisions. * **Communication**-Possessing and utilizing compelling written and verbal communication skills. Listening and adapting to received instructions, concerns, and spoken/written needs. |

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| Preferred Education and Work Experience |
| * At minimum, Associates degree, or relevant work experience. * Minimum two years of clean energy industry or similar work experience. * Proficient in advanced Microsoft products ,Excel , Outlook, Power Point. * Experience using computers and computer systems, entering data or process information. * Strong Math and Analytical work experience. |
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| Working Environment/Physical Activities |
| This job operates in a professional office environment and may be eligible for remote work. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of this job.   * Sedentary computer work. * Position is subject to irregular hours. * May require occasional travel to attend off-site meetings and or conferences. * Must be able to lift 35 lbs. * Ability to read, write, and understand English fluently. |

***I have read this job description and fully understand the requirements of the position. I accept the position and agree to follow the requirements listed. I will perform all duties and responsibilities to the best of my ability. I understand that I may be assigned other duties, in addition to or in place of those described previously. I also understand that the essential duties of this position may change at any time, according to the needs of Clean Energy Credit Union. I agree to abide by all the job requirements and qualifications listed above.***

**Employee’s Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Clean Energy CU is an equal-opportunity employer that is committed to diversity and inclusion in the workplace. We prohibit discrimination and harassment of any kind based on race, color, sex, religion, sexual orientation, national origin, disability, genetic information, pregnancy, or any other protected characteristic as outlined by federal, state, or local laws.*

*This policy applies to all employment practices within our organization, including hiring, recruiting, promotion, termination, layoff, recall, leave of absence, compensation, benefits, training, and apprenticeship. Clean Energy CU makes hiring decisions based solely on qualifications, merit, and business needs at the time.*

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| Pay Grade: 4 |
| FLSA Status: Non-Exempt |
| Date of Last Revision: 1/13/2023 |