



Member Outreach Representative (Inbound)

Department:	Marketing
Reports To:	VP of Strategic Partnerships
Classification:	Non-Exempt, G9
Pay:	\$24.02 (Min.) \$30.02 (Mid.) \$36.03 (Max.)
Type:	Full Time
Location:	Glendora, CA

Purpose:

This role focuses exclusively on timely callbacks and follow-up communication with warm, inbound leads to answering questions, removing barriers to membership, and guiding prospects through the membership process. This position does not involve cold calling, outbound prospecting, or event-based outreach.

Major Duties and Responsibilities:

- Conduct timely callbacks to prospective members who have expressed interest through website inquiries, marketing campaigns, or referrals
- Communicate with potential members via phone and email to:
 - Answer questions about membership and products
 - Address concerns or friction points
 - Guide prospects toward completing the membership process
- Maintain accurate and detailed records of all outreach activity and outcomes in the CRM
- Track follow-up activity, conversion progress, and outcomes to support reporting and performance metrics
- Collaborate with Marketing and Member Services to improve lead quality and follow-up processes
- Meet established service-level and conversion goals related to response time and successful membership completion

Minimum Knowledge & Skill Requirements:

- High-level aptitude to be able to take ambiguous information and form it into cogent deliverables aligned with a directed strategy, and remove any possible friction points to membership.
- Ability to confidently engage prospective members in consultative conversations that guide them through the membership decision process.
- High level of personal accountability and time management as it relates to follow-up or scheduling of meetings.

Expectations:

- Prompt response times to all assigned inquiries.
- Adhere to the principles and requirements of all applicable laws and regulations relating to your position and your ACCU employment, including but not limited to the Bank Secrecy Act (BSA), the anti-terrorism procedures of the Office of Foreign Asset Control (OFAC), and the Anti-Money Laundering (AML) provisions of the USA Patriot Act.
- Consistent, professional follow-up with potential members.
- High conversion of interested prospects into completed memberships.
- Accurate CRM documentation and follow-through.

Qualifications and Educational Requirements:

- A two-year college degree preferred.
- One to three years of similar or related experience
- Ability to perform duties as outlined under “Major Duties and Responsibilities.”
- Ability to communicate clearly and to be understood.
- Ability to deal with sensitive and confidential information.
- Intermediate level experience with a well-known cloud-based Enterprise CRM/Marketing automation platform.

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of responsibilities, duties, and skills required of personnel classification. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.

Pay Scale:

Our pay ranges are built to allow for candidates with various levels of skills and experience to be considered, as well as to allow room for growth and tenure achieved in this role over time. Typically, new-hire salary offers fall within the minimum to midpoint of a pay range for many candidates. Any offer extended to a candidate will be based upon their unique set of knowledge, skills, education, and experience, as well as internal equity.

ADA Compliance Statement:

In compliance with the Americans with Disabilities Act (ADA), ACCU stands ready to accommodate any qualified employee with a disability who can perform the essential duties of their position, as long as necessary accommodations for that employee’s disability don’t cause an undue burden to the credit union.

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