

Greater Cleveland Partnership Position Description

POSITION TITLE:	COSE Member Resource Advisor (MRA)
DIVISION:	COSE Member Experience
REPORTS TO:	Senior Director Member Experience
FLSA CLASSIFICATION:	Exempt

POSITION SUMMARY:

The function of the Member Resource Advisor (MRA) is to personally engage with assigned COSE members at the members' offices, by phone, via social media, and at COSE and other events; uncover each member's unique business needs; develop the plan to meet those needs; connect members with both COSE and external resources to fulfill that plan; maintain a trusted relationship with their members; seek member retention; and obtain membership referrals.

ESSENTIAL FUNCTIONS:

- Comply with all policies and procedures detailed in the MRA Best Practices Manual.
- Increase retention rate of assigned members (i.e. in their book of business) through effective service delivery and communications.
- Increase referral rate of assigned members through effective service delivery and communications.
- Serve as the primary organizational point of contact for all assigned members.
- Ensure assigned COSE members have a positive membership experience through frequent, consistent outreach and personal engagement.
- Engage members through face-to-face meetings, phone conversations, social media, email, events, and other forms as appropriate.
- Ensure new and recently renewed members receive COSE "Welcome Kits."
- Personally evaluate member needs and customize a plan for them to maximize the value of their membership.
- Complete Member Action Plan (MAP) for first and second year members to identify their expectations of membership and align with service delivery.
- Ensure members are signed up for and participating in all appropriate products, services and events.
- Play a "leadership by example" role for other staff in the implementation of the organization-wide strategy around member engagement.
- Gather feedback from assigned members on products or services most needed or wanted and provide to COSE leadership.
- Prepare and timely deliver monthly reports (with assistance of IT) showing accounts' activity, referral numbers, retention rates, and other metrics for success.
- Promptly and accurately update CRM after each engagement to document member interactions.
- Work closely in conjunction with Membership Sales to ensure smooth handoff from prospect to member.
- Other job-related duties as assigned.

COSE ESSENTIAL FUNCTIONS:

- Ensure focus on COSE core values (Sincere, Helpful, Accessible, Resourceful, Responsive) as part of COSE “Member First” Approach.
- Attend COSE University trainings and complete COSE University coursework in a timely manner to ensure and maintain current knowledge of COSE services, products, programs, engagement skills and expectations.
- Document and track all member engagements in the CRM.
- Attend both COSE and external events as required to engage with prospects and members.

PREFERRED EDUCATION, EXPERIENCE AND SKILLS:

- Bachelor’s degree or equivalent experience
- Exceptional listening and interpersonal skills (outgoing and engaging personality)
- Exceptional organizational and time management skills
- Excellent written and verbal (phone and in-person) communication skills
- Self-starter with ability to work both independently and as part of a cohesive team
- 3+ years of experience in outside sales and/or customer service (direct contact with clients/customers required)
- Experience working with small business owners
- Experience with a membership organization.
- Experience managing volunteers and/or serving as a volunteer to a membership organization
- Community/local involvement or engagement a plus
- Proficient with Microsoft Office products including Outlook, Word, Excel, and PowerPoint.
- Efficient online research skills and familiarity with social networking
- Flexibility to work outside of normal scheduled workday
- Proficiency in Spanish a plus

PHYSICAL REQUIREMENTS:

- May be required to work more than 8 hours during a workday
- Sitting for long periods of time
- Travel/driving required
- Significant manual dexterity for keying in data for long periods of time

SCHEDULING REQUIREMENTS:

- Must be available to work occasional off-hours
- Must be available during standard business hours
- Incumbent has the flexibility to schedule activity with the approval of supervisor
- Aspects of this position may be performed from a remote location with the approval of supervisor.