

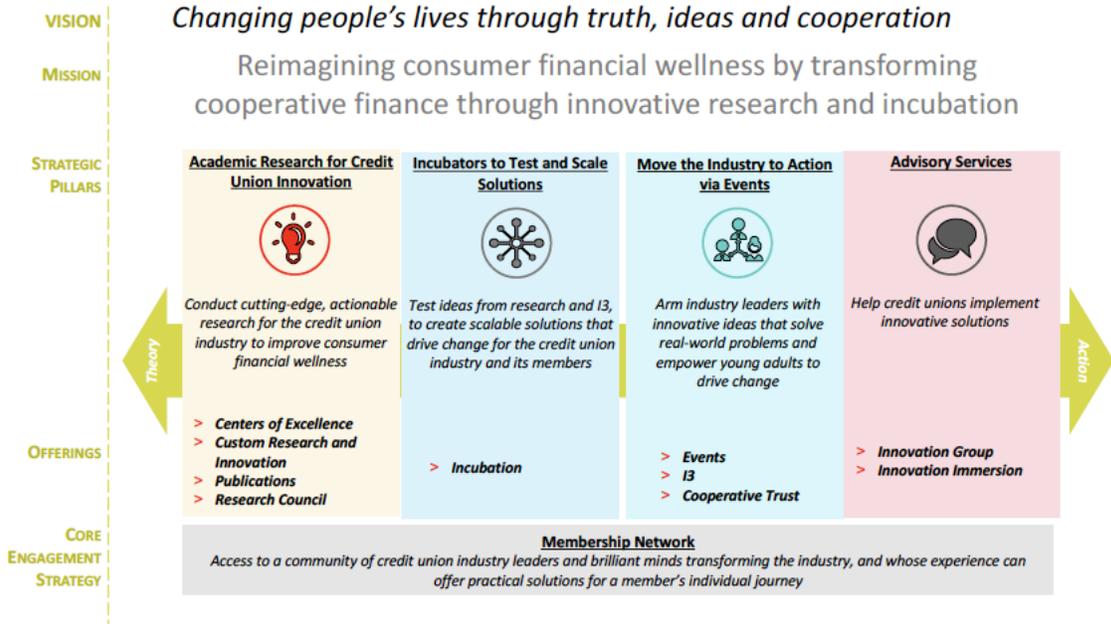
Organization Description

Filene Research Institute exists to help credit unions empower people to achieve financial wellness. We are an independent, consumer finance think and do tank dedicated to changing people’s lives through ideas, truth and cooperation. We aim to create change through insightful research, playful ideas, and rigorous experimentation to make real and lasting impact in people’s lives.

We live by the famous words of our namesake, credit union and retail pioneer Edward A. Filene: "Progress is the constant replacing of the best there is with something still better." Together, Filene and our thousands of supporters seek progress for credit unions by turning questions into research, research into ideas, and ideas into action. Filene is a 501(c)(3) not-for-profit organization. Nearly 1,000 members make our research, innovation, and impact programs possible.

Our strategic FOCUS for 2019-2022:

FILENE’S STRATEGIC FRAMEWORK



Role

Senior Membership Director

Job Location

Filene Research Institute, Madison, WI

Job Summary

This position plays an integral role in driving the membership revenue that powers Filene’s mission to reimagine consumer financial wellness by transforming cooperative finance through innovative research and incubation. As the leader of the Membership team, you’ll play a strategic role in developing, planning and managing Filene’s retention and growth initiatives. This role will:

- Oversee Filene’s overall business development, growth and retention strategy with specific focus on the \$1B+ market
- Create sales retention and acquisition strategies with related metrics
- Manage, build and drive the sales pipeline for membership
- Develop and embed within Filene best practice account management strategy to acquire, level-lift, engage and retain members.
- Manage the supporting sales processes, tools, reporting and resources needed to deliver on membership and account management strategies.
- Deliver a shining engagement experience for members
- Lead, coach and develop the Membership team

The individual must be a self-motivated, collaborative and results-driven sales leader. This critical position requires a dependable individual that will lead sustainable growth with the largest credit unions and organizations serving credit unions in North America through meaningful engagement with senior level credit union system executives and vendors. This individual must be able to communicate well, multi-task, lead people and projects and partner with senior leadership in a very fast paced small office environment.

Job Responsibilities

- Create and lead membership development, growth and retention strategies to ensure Filene’s long-term sustainability.
- Continue to position Filene to successfully engage more deeply with larger and more complex credit unions.
- Represent Filene to external audiences and immerse in Filene’s entire body of work in order to regularly and consistently convey and engage the market in the entire “story” of Filene Research Institute.
- Lead the Membership team to ensure retention and growth with current and new relationships.

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- Work with account managers and Filene team members to successfully leverage their expertise and industry relationships, enable successful handoffs and ensure that Filene is delivering on all commitments.
- Leverage and continuously improve Filene's sales and service process and systems to retain and engage Filene members and potential members in the full body of work.
- Meet with prospective clients in phone conferences, online meetings, and face-to-face to assess their needs, propose solutions, address possible concerns and persuade such clients to join and more deeply engage with Filene.
- Prepare project proposals aligning with organizational objectives, financial requirements and capacity to deliver.
- Coordinate with Filene's PMO to report on respective projects, identify potential cross-organizational dependencies, and actively engage in discussions on organizational risk, capacity and ability to deliver to plan.
- Responsible for senior level account management relationships with Filene donors.
- Model Filene values and play a key role in maintaining the culture of the organization through personal and cross-functional accountabilities.
- Actively support the achievement of Filene's strategic objectives, planning and metrics in a manner consistent with Filene's mission, values and brand.

Job Requirements

- Bachelor's degree required. MBA preferred
- 10 or more years of related experience required
- Strong working knowledge of large complex credit unions and the organizations that serve them desired
- Prior experience in business development, strategic planning, management consulting, finance, or related fields is preferred
- Strong leadership and coaching skills and a proven leadership track record
- Demonstrates entrepreneurial competencies and dexterity
- Strong interpersonal and communication skills that contribute to overall organizational performance and a positive, creative work environment
- Excellent written and oral communication skills
- Problem structuring and strategic problem-solving skills
- Self-directed, collaborative and comfortable working in entrepreneurial environments
- Demonstrated ability to manage multiple projects at once, prioritize effectively and work to aggressive deadlines
- Comfortable and skilled at speaking in front of large audiences
- Extensive relationship building and sales skills, with the ability to work with people from many disciplines and backgrounds
- Ability to sell innovative ideas, programs, advisory services, and processes to a sometimes reluctant audience

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- Demonstrated financial literacy skills in order to assess financial position of members and prospective members as well as manage multi-million revenue goals and membership budget.
- Project management experience, from strategy development to ongoing management to completion, including:
 - Experience in the preparation of project proposals and contracts
 - Relating the terms to budget constraints and organizational objectives
 - Experience in the development, design, collection, and analysis of information needed to measure progress in terms of the metrics established for activities
- Up to 60% travel required, including:
 - Member retention and prospecting meetings
 - Attending various conferences relevant to innovation or select projects
 - Sales of innovation ideas or programs to cooperative finance North American sector
 - Presenting key findings in presentations and perform advisory services on a wide latitude of research or innovation findings