



Business Development Officer

The Business Development Officer is responsible for executing CEFCU's membership growth strategy through business development, sponsor group expansion, community outreach, and relationship management. This position serves as a key ambassador of the Credit Union, identifying and cultivating opportunities to broaden CEFCU's Field of Membership, strengthen relationships with existing sponsor organizations, and generate new member growth. The Business Development Officer leverages networking, data analytics and technology to develop strategic partnerships and generate qualified leads for membership growth.

Duties and Responsibilities

- Supports and executes CEFCU's overall membership development and growth strategy to achieve annual membership and relationship growth objectives.
- Identifies, cultivates, and secures new Select Employee Groups (SEGs), sponsor organizations, associations, and community partnerships that expand CEFCU's Field of Membership and generates sustainable membership growth.
- Develops and maintains a robust pipeline of prospective sponsor groups, business partners, community organizations, and membership growth opportunities through networking, referrals, research, and strategic outreach.
- Manages and strengthens relationships with existing sponsor groups, employers and community organizations.
- Establishes growth objectives and develops action plans to increase membership growth within existing and prospective sponsor groups.
- Conducts proactive business development activities, including prospecting, cold calling, appointment setting, in-person visits, presentations, and relationship-building meetings.
- Develops and executes strategic outreach initiatives targeting eligible membership segments, under served markets, family members of existing members, and community organizations.
- Collaborates with Marketing to develop and implement membership growth campaigns, referral programs, promotional materials, digital content, and lead-generation initiatives.
- Utilizes available technology, market intelligence, industry trends, and data analytics to identify growth opportunities, generate qualified leads, and support membership development efforts.
- Coordinates new SEG onboarding activities, including enrollment campaigns, employee orientations, financial wellness seminars, and ongoing relationship management.
- Represents CEFCU at community events, employer benefit fairs, trade shows and networking functions.
- Creates and delivers presentations regarding CEFCU membership benefits.
- Assists prospective and existing members by answering questions, identifying financial solutions, opening accounts, and facilitating referrals to appropriate business units.
- Monitors market conditions, employer activity, sponsor developments, economic trends, and competitive initiatives to identify emerging opportunities and recommend new growth strategies, partnerships, products, and services.
- Maintains accurate records of business development activities.
- Recommends process improvements and innovative business development strategies that enhance operational effectiveness and membership growth.



Business Development Officer

- Performs all duties in compliance with applicable laws, regulations, and Credit Union policies and procedures.
- Performs other duties as assigned.

Qualifications and Requirements

- Bachelor's degree in marketing, business management or communications, or equivalent experience strongly preferred.
- Demonstrated success in the development and execution of strategies to build sales and successful business relationships.
- Minimum two years of experience in sales, business development, and/or relationship management.
- Excellent public speaking and presentation skills.
- Working knowledge of financial products, services, policies and procedures, and banking laws and regulations.
- Must present a professional and polished image, representing the credit union to potential and current member groups.
- Ability to attend community events before and after standard business hours, including evenings and weekends.
- Ability to develop effective working relationships with all staff at all levels.
- Excellent verbal and written communication skills in English.
- Working knowledge of various Microsoft Office computer programs, such as Word, Excel, PowerPoint, etc. Adobe InDesign and Photoshop preferred.
- Experience with marketing automation workflows and email platforms preferred.
- Ability to build, schedule, and deploy one-time, recurring, and automated email sequences from start to finish.
- Excellent time management skills, well organized, detail oriented and able to manage multiple priorities.
- Strong negotiation and problem-solving skills.
- Ability to exercise discretion and good judgment.
- Ability to lift, carry, push and pull items weighing up to 40 lbs.
- Ability to stand or walk for extended periods of time.
- Must have reliable transportation and the ability to travel from one location to another easily as needed.
- Valid California driver license and auto insurance.
- Must be bondable by the credit union's insurance agency.

Salary Range

- \$31.61 – \$47.42