

CHIEF EXPERIENCE OFFICER

Northwest Federal Credit Union

\$4.3B Assets

Herndon, VA

Position Overview

The chief experience officer (CXO) provides leadership, systemic strategic thinking, and pragmatic action to identify, plan and execute strategies to achieve excellence in member service while promoting a culture of member-centric excellence across all member touchpoints. The CXO works in close partnership with members of leadership and is responsible for the development and execution of strategic initiatives to achieve or exceed measurable service excellence goals.

Reporting directly to the chief executive officer (CEO), the CXO is responsible for ensuring and delivering an exceptional and consistent experience to the members across the credit union's products, services, and channels while using data to drive decisions. The CXO leads the credit union to maintain a holistic focus on providing progressive and evolutionary levels of member experience. The CXO is responsible for co-creating a cohesive member experience vision and supporting direct reports in delivering a member-centric experience through delivery channels of branches, call center, and community-facing and reaching resources, including remote and digital delivery.

The CXO oversees 175 employees, four direct reports, 11 branches, one Call Center, and one SEG Business Development Group. The position is considered an in-office position for cross-functional collaboration.

Vision and Strategy

- Strategically develop, prioritize, and oversee system-wide member experience initiatives.
- Participate in the planning, development, implementation, and evaluation of strategic business and performance goals.
- Embody strategic awareness of how culture, brand, and organizational changes interact.
- Continually strive to anticipate and identify members' needs using qualitative and quantitative data.

Leadership

- Provide leadership to member-centric areas, including lending, retail/branches, remote delivery, brand, marketing, community departments, and keeping the alignment around the member experience as an organizing principle.
- Provide direction of the organization's resources for branch and call center member-facing areas of the institution.
- Provide leadership that results in member acquisition, retention, and relationship depth.
- Delegate appropriate levels of responsibility and authority and initiate value-added, member-focused metrics that measure the experience provided to our members.
- Ability to utilize data on an ongoing basis to prioritize efforts and achieve results.
- Humbly engage staff to identify problems and test potential solutions.

- Be a leader with CEO Succession potential.

Planning and Organizing

- Readily modify, respond, and adapt to change and adjust personal style to work with diverse perspectives.
- Lead annual sales production to meet organizational goals across products and services.
- Lead the efforts to plan, organize, motivate, and control resources, procedures, and protocols to achieve specific goals.
- Design and integrate the necessary management systems to allow information to flow up, down, and across the credit union, including timely communications with the Board of Directors.
- Allocate, adjust, and manage resources to priorities.

Partnership

- In collaboration with other leaders, proactively lead the design and implementation of cultural and experiential change centered around building relationships with members and a passion for experience focusing on the member experience.
- Ensure CXO change initiatives align with the timing and messaging of other activities.
- Develop productive and generative partnership relationships with other executive team members and other organization leaders to influence hundreds of people positively.
- Constructively partner with others to ensure the internal and external brand align.
- Utilize the knowledge of others' needs, wants, beliefs, attitudes, and behaviors to promote a concept, product, or service.

Ongoing Learning and Coaching

- Proactively and continuously learn and self-educate on industry and changing trends in member experiences, products, sales, and services and react to changes in a way that beats the competition.
- Continue executive education to remain constantly aware of new ideas and approaches to understand and serve consumer expectations.
- Understand the digital landscape and its impact on member experience and consumer expectations.
- Stay abreast of regulatory requirements that affect functional areas.
- Continuously develop leaders and provide one-on-one and team coaching.
- Effectively build commitment and accountability in others.

Community

- Work within the community to support community presence and outreach supporting the credit union's cultural values.
- Strengthen relationships within the community to understand their needs better and align with strategic goals.

Knowledge, Skills & Abilities

- Reflect demonstrated proficiency relevant to the role and have the responsibility for working closely and cooperatively with peers to ensure all parts of the credit union contribute to an excellent member experience.
- Ten to fifteen years of similar or related experience is necessary.
- Expertise in strategic visioning, planning, and execution of strategic initiatives.

- Show a demonstrated relevant experience in building and sustaining relationships in partnership and expertise in leading the relevant functional areas such as branches and call centers.
- Possesses relevant expertise with financial products, services, and delivery channels and critical and conceptual thinking skills to observe and analyze data to innovate new methods, techniques, or processes to integrate issues and factors into a practical framework.
- Possess positive influencing skills to bring others to new thinking and mindset.
- Proven, high-level experience of decision-making within the discipline and authority of the role.
- Demonstrate an embodied self-clarity and self-accountability as well as strong coaching skills for the development of others.

Education

- Advanced education that is relevant to the role, such as an MBA
- Ongoing learning through certifications, workshops, and conferences such as CUES CEO Institute, CUES School of Strategic Marketing, and CUNA Management.
- Other member-focused, problem-solving certifications or competencies are desirable.

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