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OPPORTUNITY PROFILE CHIEF EXPERIENCE OFFICER

SASCU
FINANCIAL GROUP

the right people

SASCU FINANCIAL GROUP | CHIEF EXPERIENCE OFFICER

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THE REGION

SHUSWAP REGION

The Shuswap region is one of British Columbia's most beautiful hidden gems, where work-life balance isn't just an idea, it's your everyday reality. Tucked away in the heart of the province, the Shuswap offers a rare mix of breathtaking natural beauty, small-town charm, and genuine community connection.

At the centre is Shuswap Lake, a sparkling playground perfect for boating, paddleboarding, swimming, or just relaxing on a sun-warmed beach. But this isn't just a summer destination, it's a four-season wonderland. Picture yourself hiking to hidden waterfalls in the fall, skiing powdery slopes in winter, and enjoying local farmers' markets bursting with fresh produce come spring.

Thinking about the kind of place you'd love to raise a family? Here, kids still play outside until dinner. Communities like Salmon Arm, Sicamous, and Sorrento are safe, welcoming, and full of opportunity with excellent schools, friendly neighbours, and countless programs and activities for all ages.

Life in the Shuswap moves at just the right pace, energizing yet unhurried. It's where you can paddle across the lake before work, walk your kids to school, grab a local coffee, and catch a sunset all in one day. It's where your career and your life don't have to compete, they complement each other.

So if you're looking for more than just a new job, if you're craving space to grow, time to connect, and a community that feels like home, the Shuswap is ready for you.



THE ORGANIZATION

SASCU FINANCIAL GROUP

With operations in the Southern Interior of BC, Salmon Arm Savings and Credit Union (“SASCU”) is a forward looking, community hearted financial organization driven to provide world class products and services. With five established locations, including wealth management and insurance subsidiaries, SASCU is continuing to grow in size, offerings, and quality and continues to be the number one financial institution of choice for businesses and residents in the Shuswap region.

Established in 1946, SASCU has been helping local residents achieve their financial goals for 80 years. Originally formed by local orchardists who recognized that they all would grow stronger by reinvesting in the community, they have held onto SASCU’s co-operative roots. SASCU communities and its members continue to prosper under this co-operative philosophy and unique credit union structure: Its members are also its owners and its customers.

SASCU Financial Group offers a broad range of personal and business financial services through SASCU Credit Union and its three lines of business, SASCU Insurance, SASCU Wealth, and Commercial banking. Credit Union branches are in Sicamous, Sorrento, Enderby and two in Salmon Arm. The organization’s growth continues with nearly 20,000 members, 150 staff, and over \$1 billion in balance sheet assets.

To learn more, please visit SASCU Financial Group’s [website](#).

THE OPPORTUNITY CHIEF EXPERIENCE OFFICER

SASCU is seeking a forward-thinking, strategic leader to join the Executive Leadership Team as the Chief Experience Officer, reporting directly to the President & CEO. The Chief Experience Officer provides strategic leadership, direction, and oversight to the member-facing functions of SASCU, including the banking division (retail, broker, commercial and, contact centre), member experience and the insurance and wealth divisions. This role provides direction and leadership to the banking, and wealth & insurance networks through coaching and development, oversight, and monitoring the effectiveness of all strategies, programs, and activities. The Chief Experience Officer designs and oversees the implementation of appropriate strategies and programs to develop and grow member relationships. They ensure service delivery systems and member contact points are providing the highest level of member service and satisfaction, clearly linking to SASCU's overall strategy. The Chief Experience Officer role models leadership, promoting and living SASCU's values, and fostering a culture where members are at the centre, employees are engaged, and SASCU is recognized as a community partner.



Specific Accountabilities

Builds a Best-in-Class Sales and Member Experience Culture

- Establishes and sustains an advice-led sales culture across all delivery channels, driving growth in member relationships, wallet share, and new member acquisition;
- Ensures consistent, member-centric experience that enhances satisfaction, loyalty, and advocacy;
- Aligns sales practices, advice frameworks, and member engagement approaches with SASCU's values, brand promise, and strategic objectives;
- Embeds a common, organization-wide approach to advice delivery that strengthens member



engagement and confidence in financial guidance;

- Leads enterprise initiatives and change programs to achieve defined business outcomes, in collaboration with Human Resources and Training;
- Provides stewardship of the SASCU brand by ensuring consistency in marketing direction and employee behaviours across all member touchpoints;
- Advances product and service innovation that enhances member value and supports organizational strategy;
- Develops and maintains strategic relationships with members, partners, consultants, and vendors in support of growth and innovation.

Provides Enterprise Leadership Across Banking, Wealth, and Insurance

- Exemplifies SASCU's values and leadership competencies within the organization and the broader community;
- Translates Board-approved vision, mission, and strategy into clear, executable priorities across Banking, Wealth, and Insurance operations;
- Ensures organizational structures, resources, and governance frameworks support effective, efficient, and scalable operations;
- Drives accountability and continuous improvement through disciplined performance management and leadership practices;



- Oversees talent development, succession planning, and leadership capability to ensure organizational sustainability;
- Empowers and holds senior leaders accountable for delivering operational excellence and strong member outcomes.

Delivers Sustainable Financial and Operational Performance

- Achieves growth and profitability objectives for the branch network and subsidiaries in alignment with strategic priorities and risk appetite;
- Provides transparent, timely, and accurate reporting of financial and operational performance to the CEO, Executive Leadership Team, and Board of Directors;
- Proactively identifies and addresses emerging opportunities, risks, and challenges at the enterprise level;
- Leads the development and execution of strategic and annual operating plans to deliver approved outcomes;
- Ensures the protection of organizational assets and the fulfillment of fiduciary responsibilities across Banking, Wealth, and Insurance operations;
- Manages operating and capital expenditures within approved plans while supporting service excellence and strategic investment;
- Ensures effective operational risk management and compliance with all applicable regulatory, legal, and audit requirements.



THE PERSON

A values-driven, strategic leader who brings strong operational expertise and a deep commitment to member experience. This individual is confident operating at the executive and Board level, provides sound judgement, clear advice, and decisive leadership while knowing when collaboration and consultation are essential. They lead with integrity, model SASCU's values, and consistently place members at the centre of decisions and actions.

The ideal candidate is people-focused, someone who excels at building relationships and high-performing, engaged teams across diverse business lines. They are an experienced coach and mentor who champions talent development, succession planning, and a strong sales and service culture. With a proven ability to lead through change, they inspire others, align teams around strategy, and translate vision into clear priorities and measurable results. This person will live the values of Integrity, Initiative, Imagination and Impact and will lead relationship-driven growth strategies that strengthen member loyalty, community trust, and long-term organizational success.

Curious and adaptable, staying current with industry trends and innovation, build strong partnerships internally and externally, and are motivated by contributing to SASCU's success as a trusted, community-focused financial institution, this might just be the opportunity you are looking for.



Qualifications

Education and Experience

- A post-secondary degree or designation in a business-related field (Master of Business Administration (MBA) preferred) or equivalent;
- 10–15 years of progressively responsible leadership experience in financial services, including a minimum of 3 years at the senior management level;
- Demonstrated effective working relationships with executive teams, Board of Directors, and CEO;
- Experience leading a high-performing team.

Skills and Abilities

- Ability to discern between acting decisively and knowing when to seek consultation or collaboration;
- Knowledge and understanding of the principal processes and practices of a highly effective financial institution;
- Exceptional strategic thinking skills;
- Demonstrated ability to integrate strategic perspective with operational detail, informed by SASCU's internal and external environment;
- Ability to stay current on the changing business environment and innovations within the financial services sector;
- Exceptional leadership, critical thinking, coaching, mentoring, and motivating skills;
- Effective change leader with the ability to evaluate options, prioritize solutions, and influence outcomes across the organization;
- Ability to excel as both a team leader and individual contributor;
- Excellent written and oral communication skills, with outstanding interpersonal abilities;
- Ability to translate strategy, set context for staff, negotiate, build partnerships, influence change, and gain commitment across the organization.



Competencies and Personal Characteristics

Leadership – Achieves desired organizational results by encouraging and supporting the contribution of others; a proactive and positive team player who acts with a sense of urgency and leads by example; sets and communicates clear goals.

Accountable – Holds self and others accountable for responsibilities; focuses on results and measuring attainment of outcomes in a business focus.

Strategic – Develops a plan in support of organizational strategic direction. Demonstrates an understanding of the link between one’s job responsibilities and overall organizational goals.

Integrity and Honesty – Demonstrates a resolute commitment to and respect for the spirit behind the rules and core values of the organization, setting an example of professionalism and ethical propriety.

Influential and Collaborative – Has an open and consistent approach to working with others and possesses strong interpersonal skills, with the ability to build relationships and develop/maintain partnerships, obtaining stakeholder agreement.

Creativity and Innovation – Develops new insights into situations; questions conventional approaches; encourages new ideas; designs and implements new or cutting-edge programs/processes.

Effective Working Relationships – Treats colleagues, and stakeholders with respect; resolves conflicts in a timely manner, negotiates effectively, and provides effective feedback to colleagues/employees.

Communication – Clearly presents written and verbal information; writes with clarity and purpose; communicates effectively in both positive and negative circumstances; listens well.

People Development – Fosters learning and development of others through coaching, managing performance and mentoring; has a genuine desire to develop others and help them succeed; formally and informally recognizes deserving staff and colleagues.

Stakeholder Focused – Anticipates and attends to the needs of internal and external stakeholders of the organization; keeps stakeholder interests in the forefront.



COMPENSATION

A competitive compensation package will be provided including an attractive base salary range of \$174,688 - \$218,360, variable incentive compensation program which includes a performance-based incentive plan, extended health and dental benefits, a defined contribution pension plan, generous paid time off, and opportunities for professional development. As part of a values-driven organization, you'll also benefit from a supportive culture that prioritizes work-life balance, community involvement, and meaningful career growth. Further details will be discussed in a personal interview.

FOR INFORMATION PLEASE CONTACT:

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