

# Customer Service Representative

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## Position Description

This position is responsible for performing customer services, such as opening new accounts, establishing direct deposit accounts, opening retirement accounts, and assisting customers with queries concerning financial institution services. In addition, this position is responsible for the development of new business relationships and maintaining existing relationships.

## Position Accountabilities

- Provide complete customer services at the financial institution, including: opening new accounts, explaining bank products and services which are appropriate to customers needs, and gathering information needed to accurately and efficiently process new and existing accounts.
- Support accomplishment of branch sales goals by identifying customer needs and promoting/selling the bank's products/services; including, but not limited to, cross selling products /services to expand customer relationships, promoting the bank through community involvement, and referring business to other branch teammates and business partners.
- Adhere to established Retail Service Quality Standards including, but not limited to, compliance with the bank's dress code and ensuring that all work stations are neat and orderly.
- Complete arrangements and documents for special services such as foreign currency/items, direct deposits, the origination of outgoing wires, services government bond transactions, and performs other customer services duties, as necessary.
- Handle customer inquires, including but not limited to, telephone inquires, research, faxes, producing statement /check copies.
- Maintain knowledge of the bank's products/services, pricing, and the bank's customer relationship management software (Anchor).
- Complete all assigned training courses in a timely manner and embraces cross training on other responsibilities (i.e. teller functions).
- May perform a variety of administrative functions, including but not limited to, servicing overdrawn/past due accounts (i.e. letters, collections) and new account follow-up (i.e. Thank You letters and phone calls).
- May provide assistance to Head Teller, Assistant Branch Manager, or Branch Manager to ensure satisfactory audit ratings are achieved at the branch level; including, but not limited to, responsibility for completing portions of the branch's Monthly Internal Control Report (MICR) and creating documentation specific to other operating policies/procedures.
- May support other branches or positions (i.e. teller functions) during peak periods of staff shortages.
- Perform other such duties as assigned.
- Maintain compliance with and adhere to all state and federal regulations and bank policies and procedures, including, but not limited to Bank Secrecy Act, FACT ACT, Community Reinvestment Act, and EEO/AA/Fair Employment Practices.

## Organizational Relationship

This position reports to the Branch Manager.

## Position Qualifications

### Education & Experience

- High school diploma or equivalent
- Minimum of one year experience in customer service, as well as sales experience, particularly in cross-selling products and services preferred

### Knowledge & Skills

- Proven ability to recognize and respond to sales opportunities
- Ability to successfully complete in-house Customer Service Representative training or other approved training program
- Ability to work all branch hours, including weekends and evening required
- Demonstrated skills in the following categories:
  - Customer service to include customer confidentiality
  - Computer to include industry related software
  - Excellent written and oral communication skills
  - Excellent computer skills relevant to Microsoft Office Suites (i.e. Word, Excel, Outlook)

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## **Position Administration – HR Only**

Job Code: 001-05

Grade: 05

Range: \$25,294.19 to \$37,941.29

FLSA: Non-Exempt