



Customer Service Representative

Department: Retail

Job Code: 001-05

Reports to: Branch Manager; Assistant Branch Manager

FLSA: Hourly/Non-Exempt

Grade 5; Range \$25,294.19 to \$37,941.29

Supervises: None

Revised: 01/29/14 kcs

SUMMARY

Performs customer services, such as opening new accounts, establishing direct deposit accounts, opening retirement accounts, and assisting customers with queries concerning financial institution services. Responsible for the development of new business relationships and maintaining existing relationships.

MINIMUM REQUIREMENTS FOR POSITION:

- High school diploma or equivalent.
 - Twelve months experience in customer service, as well as sales experience, particularly in cross-selling products and services preferred.
 - 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
 - Communication (verbal, nonverbal, written)
 - Computer to include industry related software and Microsoft Windows based applications
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PRIMARY ACTIVITIES AND RESPONSIBILITIES:

- Provides 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.
- Supports 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.
- Adheres 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.
- Completes 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.
- Handles customer inquiries, including but not limited to, telephone inquiries, research, faxes, producing statement /check copies.
- Maintains knowledge of the bank's products/services, pricing, and the bank's customer relationship management software (STAR).
- Completes 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
- Responsible for adhering to and complying with all Bank policies and procedures, all applicable federal and state laws and regulatory guidance governing financial institutions, including, but not limited to, Federal Deposit Insurance Improvement Act (FDICIA), FACT Act, Bank Secrecy Act and Regulation CC.
- Other such duties as may be assigned as needed.