

Connection Bank

Position Description for Bank Services Specialist

Department: Retail Operations
Reports to: Branch Manager
Supervises: N/A
FLSA: Nonexempt

Summary

The position of Bank Services Specialist provides a variety of banking services including tellering, opening deposit accounts, and providing service in all areas of retail operations with an emphasis on exceptional customer service. While performing these duties, the incumbent must strive to live our core values by embracing a “can do attitude”, demonstrating our brand of customer service “on steroids”, and protecting our customers’ security and privacy.

Essential Duties and Responsibilities

- Provides exceptional customer service by greeting customers upon entering the lobby.
- Advocates the benefits of Connection Bank products and services to promote customer enthusiasm and engagement.
- Processes various customer transactions (deposits, withdrawals, transfers, loan payments, money orders, cashier’s checks, cash advances) while complying with Bank policies and procedures.
- Issues new or replacement debit cards.
- Places check orders.
- Maintains a working knowledge of all Bank products and is able to promote and explain them.
- Makes appropriate customer referrals to other functional areas of bank.
- Assists customers with account maintenance.
- Maintains and balances ATM cash, replenishes cash supply, and ensures the ATM is in working order at all times.
- Processes both incoming mail transactions and night depository transactions under dual control, efficiently and accurately.
- Maintains and balances coin machine and prepares mutilated currency for shipment.
- Verifies and balances cash drawer daily, maintaining acceptable balancing standards according to Teller Policy.
- Assists others in reconciling errors or discrepancies, when necessary.
- Performs safe deposit box operations such as opening new boxes, allowing customers access to their boxes, and account maintenance.
- Demonstrates willingness to work at any branch office.
- Provides phone coverage as needed.
- Completes assigned compliance training.
- Opens new deposit accounts.
- Issues certificate of deposits.
- Performs other duties as required or assigned.

Skills and Abilities

- Promotes Connection Bank core values.
- Projects a positive image of the bank to all internal and external customers.
- Demonstrates the ability to hold confidential information and displays honesty and high ethical standards.
- Strives for high customer satisfaction, is helpful, pleasant, approachable, and team-oriented.
- Knowledgeable of bank operations, policies, procedures, products, and services.
- Able to use relevant information and individual judgment to determine whether events or processes comply with laws, regulations, and/or standards.
- Develops constructive and cooperative working relationships with others, and maintains them over time.
- Exceptional oral, written, and interpersonal communication skills with the ability to apply common sense while performing work.
- Excellent organizational and time management skills.
- Proficient in computer operations with working knowledge of Microsoft products and the ability to learn bank specific programs.
- Ability to work with minimal supervision while performing duties.

Physical Demands

The person in this position must be able to:

- remain in a stationary position for approximately 80% of the day.
- move about inside the office to access file cabinets, office machinery, etc.
- operate a computer and other office productivity machinery, such as an adding machine, copy machine, printer, postage machine, and branch capture scanner.
- lift and/or move up to 20 pounds.

This description reflects management's assignment of essential functions, it does not proscribe or restrict the tasks that may be assigned and is subject to change at any time. This job description does not constitute an employment agreement between the Bank and employee and is subject to change by the employer as the need of the Bank and requirements of the position change.