

# CUSTOMER SERVICE REPRESENTATIVE

## Job Description



**DEPARTMENT:** Retail

**REPORTS TO:** Branch Manager

### POSITION SUMMARY

Provides a variety of customer savings, checking and credit account transactions, as well as customer services such as sales of money orders and traveler's checks. Responsible for comprehensive, prompt and efficient customer transactions. Responsible for promoting other banking products to customers as well as opening new accounts during high volume periods. Balances cash drawer at end of shift and compares totaled amount to computer generated proof sheet.

### ESSENTIAL DUTIES & RESPONSIBILITIES

#### Teller Activities:

- Completes customer transactions including daily deposit account transactions, loan payments and night deposits.
- Process customer orders for savings bonds and cashiers checks.
- Provide access to safe deposit boxes following specialized procedures.
- Process ATM transactions and maintains appropriate levels of available cash.
- Balance currency, coin and checks in cash drawer at end of shift.

#### Customer Service:

- Respond to customer questions and follow through on customer requests.
- Answer incoming calls in the absence of branch receptionist.
- Direct customers to appropriate personnel.

#### Sales:

- Match customer and potential customer needs to bank products and services.
- Makes referrals to appropriate personnel.

#### New Account Representative:

- Open new checking, savings, CDs and all other deposit accounts for customers during high volume periods or in the absence of the Assistant or Branch Manager.

## OTHER FUNCTIONS

- Assists Lead Customer Service Representative in vault duties, pack bundles, etc.
- Filing as needed including signature cards, ATM applications, maintenance forms, etc.
- Order checks, savings bonds, etc. as needed.
- Maintains compliance with all banking laws, acts, regulations and bank policies and procedures.
- Any other duties and/or projects as assigned by Management.

## REQUIREMENTS & QUALIFICATIONS

Education: High School Diploma

Experience: Cash handling and customer service experience preferred.

Specific Skills: Strong communication skills; cash handling experience; proficient computer skills.

Specialized Knowledge, Licenses, etc.: none

Supervisory Responsibility, if any: none

Working Conditions: Required to stand regularly; seating provided. Shifts scheduled during banking operating hours: Monday thru Thursday 8:00am-5:00pm, Friday 8:00am-6pm, Saturday 8:00am-12:00pm.

**Employee Name (Print):**

**Employee Signature:**

**Date:**