

LEAD CUSTOMER SERVICE REPRESENTATIVE

Job Description



DEPARTMENT: Retail

REPORTS TO: AVP, Branch Manager

POSITION SUMMARY

Oversees Customer Service Representatives (CSR) activities and maintains records of vault and CSR cash balances. Ensures adequacy of currency and coin supply for branch. Provides guidance to CSRs in complex customer transactions, balancing and meeting customers' needs. Provides on-the-job training for CSRs on an as-needed basis. Monitors CSRs to ensure compliance with financial institution procedures and policies.

ESSENTIAL DUTIES & RESPONSIBILITIES

Customer Service/Sales:

- Completes customer transactions.
- Answers customer questions and follows through with customer requests.
- Discusses and recommends products and services to customers.
- Provides access to safe deposit boxes.
- Works with CSR staff to assist them in meeting referral goals.
- Ensures the appearance of lobby and customer areas are neat and organized.
- Builds proficiencies of banking principles and service techniques by attending internal and external trainings.

Vault and CSR Activities:

- Balances vault under dual control.
- Orders and ships cash keeping within Cash Policy limits.
- Consolidates and balances daily transactions and examines other CSR reports for accuracy.
- Ensures all branch capture procedures are complete and accurate daily.
- Works with management to track and report any CSR differences.
- Ensures all negotiable and confidential records in customer areas are properly secured each day.

General Supervision:

- Coordinates CSR breaks, issues instructions, maintains harmony among CSRs and assists in resolving conflicts.
- Oversees that compliance regulations and dual control are followed by CSR staff.
- Trains employees in all retail areas as needed.
- Works with management to complete CSR schedules to ensure appropriate levels of staffing.
- Conducts unannounced regular monthly audits of the vault and CSR cash maintaining a record of each audit and reports any exceptions to manager and/or Internal Audit Liaison immediately.

New Account Representative:

- Opens new checking, savings, CDs and all other deposit accounts for customers.

OTHER FUNCTIONS

- Files documents as needed.
- Places check orders for customers.
- Maintains compliance with all banking laws, acts, regulations and bank policies and procedures.
- Any other duties, projects and supervisory functions as assigned by Management.

REQUIREMENTS & QUALIFICATIONS

- Education/Specialized License(s): High School Diploma
- Experience: At least 2 years bank CSR experience required; some supervision experience preferred.
- Specific Skills: Proficient computer skills; strong communication skills; cash handling experience.
- Supervisory Responsibility: General supervision of branch CSR staff.
- Working Conditions: Required to stand regularly. Seating provided. Shifts scheduled during banking operating hours: Monday thru Thursday 8:00am-5:00pm, Friday 8:00am-6:00pm, Saturday 8:00am-12:00pm.

Employee Name (Print):

Employee Signature:

Date: