



Job Description

Position: Branch Manager- Marshfield

Reports To: Retail Sales Manager/Retail Operations Manager

Supervises: Tellers, Consumer Banking Assistants, Relationship Managers

FLSA Status: Exempt

Revised: August 2019

Mission

Dedicated to creating fantastic experiences and providing financial peace of mind.

Vision

We will be the bank of choice by:

- Committing to our communities
- Empowering our employees
- Investing in technology

Position Summary:

Under the direction of the Retail Sales Manager/Retail Operations Manager, supports activities to maintain and develop customer satisfaction and banking relationships. Perform Teller Supervisor duties, Consumer Banking Assistant duties, and assists other Bank staff as needed by focusing on accuracy, customer service, interpersonal, and supervisory skills.

Primary Responsibilities and Accountabilities:

Consumer Banking:

- Oversee the daily routine tasks of branch operations including: security, customer service, and facilities as directed by the RSM/ROM/Management.
- Perform activities related to the maintenance, opening, or closing of various types of time and demand deposit accounts, including certificate of deposits, NOW accounts, regular checking accounts, IRA accounts, estate accounts, funeral trusts, etc., ensuring that applicable regulations, disclosures, policies and procedures are observed.
- Receive and answer questions on Bank transaction services and procedures, maintaining good customer relations at all times. Discuss routine problems related to checking and savings transactions or Bank services. Direct customers to appropriate employees for answers to special or complex problems or inquiries. Refer difficult problems to the ROM/RSM as appropriate.
- Responsible for gathering financial data for ROM/RSM for their review, and assisting the Relationship Managers and CBAs in the development of customer relationships. May support ROM/RSM and Mortgage Loan Officers with loan support activities.
- Participate in the interview and hiring process.
- Participate in Bank's sales programs by proactively contacting customers in bank-directed sales activities to enhance their relationship with the Bank.

- Ensures financial institution compliance with the Community Reinvestment Act and Equal Employment Opportunity regulations.
- Branch leadership of Haberfeld program; act as the sales leader/CAG Captain. Work with marketing/promotional products/promotions in the lobby.
- Accountability for mystery shop results.

TELLER SUPERVISOR

- Provide work direction for the teller department including complete adherence to all policies and practices of the bank and its applicable regulatory and governmental agencies.
- Schedule teller staff to ensure that adequate coverage is available during the Bank's service hours and that customer transactions are processed accurately, efficiently, and courteously. Verify that all work is balanced at end of day before imaging.
- Perform annual and mid-year teller performance evaluations against predetermined standards and make appropriate personnel action recommendations. Handle employee problems and provide counseling as appropriate.
- Demonstrate sales referral success. Coach tellers toward successfully attaining referral goals.
- Provide assistance to teller staff with data entry, special or difficult internal transactions or problems or customer inquiries/problems. Provide follow-up guidance by instructing tellers in the handling of problem areas or transactions. Assist tellers in reconciling errors as needed. Ensure prompt and courteous response to customer inquiries. Investigate equipment malfunctions and request repair services as necessary.
- Disseminate new/revised policies and procedures relative to teller operations to staff.
- Receive customer inquiries regarding account information or problems. Exercise discretion and judgment in handling customer problems and complaints. Approve checks and other transactions according to Bank policies.
- Identify customer financial needs and cross sell additional services.
- Order and maintain sufficient currency and coin. Prepare excess currency to be sold as necessary. Process regular and special request currency/change orders for commercial customers. Buy and sell cash from tellers as required. Ensure compliance with vault and cash policies and procedures.
- Perform duties of teller. Works opening, closing, and Saturday schedules.

Secondary Responsibilities and Accountabilities:

- Participates in business development activities to represent the Bank in civic, business, industrial, and professional organizations, the promotion of products or services, and maintenance of the Bank's favorable image.
- Maintains educational and professional expertise through attendance of job-related seminars, conferences, and workshops, and involvement in professional, civic, and community groups in leadership positions.
- Performs other duties as needed.

Key Contacts:**Internal:**

High contact with banking assistants, loan operations, deposit operations.

External:

High contact with Bank customers, their personal representatives, accountants, business and community groups regarding business activities, lending opportunities and programs.

Education, Experience, and Skills:

- High school diploma or equivalent with some college education
- Additional technical and/or business training
- Four to five years progressive banking experience
- Proficient math and communications skills
- Excellent interpersonal skills as evidenced by the ability to interact both face-to-face and over the telephone with customers and coworkers. A demonstrated ability to use tact, diplomacy and a professional demeanor when dealing with customers and coworkers.
- Strong verbal and written communication skills including proofreading and editing skills.
- Ability to manage multiple tasks simultaneously in a fast paced environment.
- Analytical, organizational, time management and problem-solving ability.
- Working knowledge of the bank's current operating systems, the bank's current documentation software platforms as well as various word processing and spreadsheet software.
- Recognize and incorporate the diversity of Bank customers and employees.

Competencies:

- Leadership Skills
- Coaching/Performance Management
- Effective Communication
- Organization
- Product Knowledge
- Flexibility

Contextual Information:

- Employee uses basic office equipment and computer software including but not limited to desktop computer, printer, copy machine, fax machine, scanner, calculator, telephone and voicemail, finance interfaces, Microsoft Office products, scanning software, and other.
- Employee uses personal vehicle for travel, and gets reimbursed for mileage.
- Individual may be required to work and/or attend meetings at our corporate office in New London, WI or other Bank offices as needed. Other travel that may be required includes, but is not limited to building and servicing customer (both internal and external) and business relationships, participating in community activities, promoting bank products and services, and attending educational seminars and workshops.
- Employee sits for prolonged times of mental and visual concentration in indoor office environment.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Reviewed By:

Supervisor Name	Supervisor Signature	Date
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Incumbent Name	Incumbent Signature	Date
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