



POSITION DESCRIPTION

TITLE: *Branch Service Representative*

DEPT: Operations

EMPLOYEE:

REPORTS TO: *Operations Manager*

ROLE:

Branch Service Representatives act as floaters within the Operations Department. They may be utilized at the teller line and in member services as well as providing support in the area of credit union operations. A BSR must be proficient in multiple areas and will be called on to move throughout their shift as needed. In addition, this position will support any area that needs additional help due to staffing shortages, sick days, vacations, or other absences. The BSR will be required to operate a teller drawer and will be held to the same performance and service standards as other tellers. This associate must communicate effectively with prospective and existing members in a positive and professional manner. Provide product and service information to prospective and existing members. Assist members by providing information and answering questions about the credit union, services, and the requirements for eligibility. Provide assistance and support to other members of the service team in order to maintain the credit union's service initiative.

JOB DUTIES AND RESPONSIBILITIES:

- Responsible for delivering a high level of member service to internal and external members in accordance with the credit union's service initiative.
- Meets all established service and referral goals
- Processes cash/ check transactions including deposits, withdrawals, loan payments, transfers, traveler's checks, and money orders.
- Opens new accounts and cross-sells additional credit union products and services by assessing the needs of the members and offering solutions as necessary (including IRA's & CD's).
- Performs account & member maintenance as necessary.
- Maintains member account records in accordance with credit union policies and procedures
- Maintains a working knowledge of the services and products the credit union offers.
- Assists in meeting and exceeding individual, team, and credit union goals.
- Referring existing and new members to a service partner who has specific expertise.
- Initiates follow-up mechanisms with members.
- Initializes dispute resolutions.
- Scans documents.
- Keeping informed about credit union promotions and programs.
- Complies with security regulations and watches out for and recognizes account flags.
- Balances cash drawer daily.
- Assist with community outreach programs and perform other duties as required for the efficient operation of the department.
- Performs other duties as assigned.

EXPECTATIONS:

1. To provide friendly, prompt professional and accurate service and support to all members and co-workers.
2. To maintain an excellent knowledge of financial services offered by the Credit Union
3. To maintain a professional work environment and businesslike appearance.
4. To adhere to company policy regarding attendance and punctuality.
5. To participate as a team member in the department.
6. Cross-train in other departments as needed and attend all training relative to position.
7. Position may be scheduled up to 40 hours per week. Hours and schedule will be determined by department supervisor
8. Must be able to meet the company requirements and standards as they pertain to drawer accuracy and continuing regulatory knowledge.

QUALIFICATIONS AND POSITION REQUIREMENTS:

- Experience: One year prior banking or customer service/ sales capacity experience.
- Education: A high school education or GED
- Interpersonal Skills: Must have a pleasant personality with the ability to communicate effectively through various channels; the ability to get along with co-workers and members; must be dependable and punctual; must be able to retain confidential information and make mature and professional decisions based on knowledge of Credit Union policies and procedures.
- Other Skills: Must possess the ability to clearly and effectively express ideas and thoughts, via written or spoken methods; basic reading, arithmetic, and clerical skills; ability to cross-sell services and products when appropriate; maintain a working knowledge of credit union products and services; must possess a "service" attitude and be willing to accept direction, new ideas, and adapt to change; must be able to demonstrate active problem solving skills with a focus on service.

I have received and reviewed a copy of this original position description.

Date: _____

Signature: _____