



Job Description

Job Title: Client Service Specialist
Classification: Non-exempt
Status: Non-officer

Job Purpose and Scope:

Responsible for nurturing professional relationships with customers by engaging in meaningful conversations regarding their financial needs and goals, identifying referral opportunities, and processing financial transactions. Promote a positive, helpful, and friendly team environment and provide exceptional customer service at all times.

Essential Job Functions:

1. Cultivate professional relationships with customers, utilizing assessment tools and engaging customers in meaningful conversations to uncover needs, make appropriate recommendations, and submit referrals to banking center team members or line of business partners.
2. Utilize assessment tools to maintain detailed notes regarding customer conversations and interactions.
3. Facilitate and process account transactions accurately and efficiently to minimize errors and reduce fraud.
4. Actively participate in morning huddles.
5. May open new accounts, as needed and with documented approval of management.
6. Demonstrate competency and accountability to maintain banking center operational standards, ensuring compliance with internal controls, operational procedures, and risk management.
7. Actively promote teamwork, leading by example and taking initiative to assist others.
8. Demonstrate effective organizational and time management skills.
9. Provide backup and assistance to other retail banking locations, as requested.
10. Model and champion the Bank's standards for exceptional customer service.
11. Demonstrate empathy and proactively resolve client concerns in a timely, professional, and positive manner, escalating issues to next level of authority, as needed.
12. Enthusiastically support the bank's values and mission.
13. Display a high degree of integrity, trustworthiness, and professionalism at all times.
14. Complete all essential training timely.
15. Display enthusiasm for continuous learning, accepting and applying constructive feedback from more experienced team members.
16. Maintain consistent, good punctuality and attendance to work.
17. Adhere to all Bank policies, procedures, and guidelines.

Knowledge, Skills & Abilities:

1. Knowledge of bank products and services (e.g., online banking, mobile banking applications, banking cards)
2. Knowledge of bank policies and procedures
3. Ability to provide excellent customer service and demonstrate a helpful, friendly, approachable, enthusiastic, and professional disposition
4. Ability to communicate effectively both verbally and in writing
5. Ability to demonstrate team player approach, capable of thriving in a continually changing environment
6. Ability to demonstrate critical thinking skills and accurate and efficient productivity, including attention to detail
7. Ability to work without close supervision

- 8. Ability to maintain confidentiality
- 9. Ability to follow policy and procedure including safety and security procedures
- 10. Ability to travel to other work locations (e.g., training, staffing shortages), as needed
- 11. Skill in using computer and Microsoft Office applications necessary to perform essential job functions

Basic Qualifications:

- 1. High school diploma or equivalent required; bachelor’s degree preferred
- 2. 1+ year experience interacting with people and displaying excellent service skills, demonstrated through work, military and/or education, required
- 3. Knowledge of and experience with bank products, online banking, mobile banking applications, banking cards, etc. preferred
- 4. Cash handling experience preferred

Job Expectations: Operate customary equipment and technology used in a business environment, with or without accommodation.

Note: This description is not an exhaustive list of all job functions, duties, skills, and job standards required. Other job functions, duties, skills, and standards may be added. Management reserves the right to add or change the job requirements at any time.

Employee Certification

I have read and reviewed my job description with my supervisor. My supervisor has explained to me the essential functions of my job. I understand that these functions are not exhaustive and are subject to change during the course of my employment.

Employee Name (Print)

Employee Number

Employee Signature

Date

Supervisor Signature

Date