

Job Title: Customer Relations Manager One (CRM)	Last Revision: 3/2016
Percentage of Time Allocated: 100%	
Salary Grade: 14	
Department: Branch Operations	
Reports To: Branch Assistant Manager (BAM)	
Supervises: None	
FLSA Status: Non-Exempt	
Summary: Utilizing the “Customer Xperience” behavioral standards, provides excellent customer service, builds relationships with new and existing customers while making sure policies and procedures are followed.	
Job Requirements: <ul style="list-style-type: none"> • High school diploma or equivalent • Successful completion of in-house training programs • Minimum two years’ experience in banking preferred but not required • Basic math and problem-solving skills • Good understanding of financial products and services • Exceptional customer service and professional skills • Good organizational telephone skills, and communication skills • Ability to multi-task • Basic computer and keyboard skills including but limited to using Microsoft Word, Excel, and PowerPoint • Team Player 	
Specific Job Functions: <ol style="list-style-type: none"> 1. <u>Strategic Objectives</u> <ol style="list-style-type: none"> a. Reviews, executes, and practices objectives within SFSB’s Strategic Plan b. Realize and support strategies goals 2. <u>Branch Growth</u> <ol style="list-style-type: none"> a. Assist in meeting profitability standards 3. <u>Building Customer Relationships</u> <ol style="list-style-type: none"> a. Participates in activities for generating new business such as sales calls and special events b. Participates in community organizations, activities, and civic organizations c. Responsible for knowing and cross-selling bank products to help the customer obtain their financial goals d. Work to improve overall customer Xperience with team e. Utilizes SFSB’s customer service relationship management software (CRM) f. Attends to the needs of customers and prospective customers on banking matters of the following types: <ul style="list-style-type: none"> • Greet customers by name, use name in conversation • Respond to customer inquiries within 24 hours, within one hour if it is an emergency 4. <u>Communication</u> <ol style="list-style-type: none"> a. Reports at internal Branch meeting monthly b. Participates in weekly Branch huddles c. Communicates with team regularly 5. <u>Compliance</u> <ol style="list-style-type: none"> a. Responsible for knowing and complying with all Bank policies and procedures that apply to the position b. Responsible for knowing and complying with all Federal Regulations that apply to the position, including, but not limited to: Bank Secrecy Act (BSA), Customer Identification Program (CIP), Funds Availability (Reg CC) and Currency Transaction Reporting (CTR) 6. <u>Teller Duties</u> <ol style="list-style-type: none"> a. All Teller duties as listed on the Teller job description. 	

7. Deposit Account Duties

- a. Performs a variety of customer service transactions, such as account holds, stop payment orders, savings bonds, and more
- b. Serves as primary contact for new accounts openings (ranging in complexity from simple personal accounts to complex corporate accounts; as well offers value-added services using a need-based approach
- c. Closes all types of deposit accounts
- d. Close-out reports and maintenance
- e. Death Hold Procedures; letters and maintenance
- f. Complete verifications received from other companies
- g. Works Synapsys event Queue (service notes and processes)
- h. Orders checks for personal and business account customer via Quick Check
- i. Performs maintenance, orders, and issues Debit and ATM cards following the Banks procedures
- j. Follows and adheres to Customer Xperience program
- k. Attends all required retail deposit training and meetings

8. Additional Responsibilities

- a. Participates on SFSB's assigned committees
- b. Coordinates PTO days with Branch staff to ensure Branch is accurately staffed at all times
- c. Answer phone as needed
- d. Performs other duties as directed by supervisor

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities. While performing the duties of this job, the employee is required to use hands to handle or feel objects, tools or controls. The employee frequently is required to sit, reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk, climb or balance; and stoop, kneel, crouch or crawl. The employee must regularly lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision.

The work environment characteristics described here are representative of those an employee encounters while performing the essential duties and responsibilities of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities. The noise level in the work environment is usually moderate to quiet.

Employee Signature

Date

Supervisor Signature

Date