Client Service Representative - 2018

**Title:** Client Service Representative

**Department:** Retail

**Reports to:** Office Manager

**Positions Supervised:** Non-exempt

**Position Summary:** Perform all assigned client service and operational functions as shown on CSR training checklist. Provide competent and courteous service to current and prospective clients

**Primary Accountabilities and Responsibilities:** (95%)

**Accountability 1:** (60%) Clients Service

* Greet clients by name in a friendly, courteous and professional manner.
* Maintain confidentiality of customer and bank information
* Understand Personal and Business Deposit bank products and services and review them with clients and be capable of readily opening products and services at a customer or colleague’s request.
* Communicate effectively with clients to identify needs and then utilize skills and tools to refer clients to the appropriate personnel for deposit accounts, loans, investments, insurance and

cash management services.

* Assist clients with digital and e Banking products including telebanking, online banking and mobile banking products
* Communicate effectively with colleagues in all departments to collaboratively provide an outstanding client service
* Solve client complaints to the client’s satisfaction within BankIowa’s guidelines
* Process client’s transaction requests accurately in compliance with established Best Practices
* Utilize telephone etiquette techniques to professionally handle clients calls
* Complete all specific client care duties as detailed on the CSR training checklist

**Accountability 2:** (35%)

* Complete all Operational Duties as listed on the CSR training checklist
* Contribute to maintaining the professional appearance of bank premises and work areas
* Follow bank policies and procedures for compliance relative to the functions of the position. Employee will also be responsible for completing applicable annual compliance training as required by compliance laws, regulations and bank policy
* Comprehend and comply with all pertinent Bank Secrecy/OFAC/CIP policies and procedures. Complete annual training. Maintain awareness of customer expected and unexpected transaction habits. Report all anomalies to Bank Secrecy Act Officer

**Secondary Duties and Responsibilities: (5%)**

* Perform miscellaneous duties as requested by supervisor relating to the bank and its functions. Other duties may be assigned
* Participate in client functions and community service events as a bank representative

**Education, Experience, and Other Requirements:**

* High School diploma and banking experience
* Must be bondable

**Performance Measures:**

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to sit. He/she is occasionally required to stand; walk; use hands to handle or feel objects, tools or controls; and reach with hands and arms. The employee must occasionally lift and/or move up to ten pounds.

**Acknowledgement**

I have read the foregoing job description and understand the responsibilities of the job and the importance of exhibiting the service quality standards and work performance expectations. I believe I can perform this job with or without accommodation.

Employee signature Date

Supervisor signature Date

This position description describes the general nature and level of work performed by the individual assigned to this position and should not be interpreted as all inclusive. It does not state or imply that these are the only duties and responsibilities assigned to the position. The employee may be required to perform other job-related duties. All requirements are subject to change and to possible modification to reasonably accommodate individuals with a disability. This position description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the position change.