



## Client Experience Representative

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**Job Title:** Client Experience Representative

**FLSA Status:** Non-Exempt

**Schedule:** Full-Time

**Reports to:** Assistant Branch Manager

**Salary Range:** \$18.00-\$23.00/ hour

### General Job Description

The Client Experience Specialist, will primarily be responsible for enhancing the clients's daily experience and for providing professional assistance to the bank's clients.. This position performs a wide variety of duties to service clients in a courteous, professional manner, by providing prompt, efficient, and accurate service while processing financial transactions. The right person for this position will have a friendly demeanor, a can-do attitude and take the initiative to help others at all times.

This is a 40-hour per week non-exempt position, Monday through Friday, hours will range from 8:00 a.m. to 5:00 p.m. A Saturday rotation from 8:15 a.m. to 12:15 p.m. will be required.

### Duties and Responsibilities

- Provides efficient, effective and courteous client service;
- Performs a variety of transactions to service the client
- Maintains effective knowledge of Bank's products and services;
- Ensures the accuracy of activities. Balances transactions and cash at the end of the day;
- Answer incoming calls by providing clients with information, and directs client calls to appropriate departments;
- Ability to practice branch security by consistently protecting client confidentiality and privacy;
- Ability to evaluate current client needs and cross-sell appropriate bank products to them;
- Secure all vaults, balance vault and ATM cash, and handle night drop deposits;
- Process coin through the coin machine; and roll coin;
- Perform duties in compliance with policy and procedure;
- Prepares and distributes periodic reports and notices;
- Process daily work;
- Regular and reliable attendance required/physical presence at bank;
- Perform other duties as assigned.
- Handle mail, returned mail and the process and procedures associated, and any correspondence
- Assist with efficiently and accurately review account openings

- Assist with sending out Thank you cards to clients to enhance the client experience.
- Monitor and order office supplies, monitor office equipment and schedule repairs
- Assist in organizing and running errands for items needed for client appreciation events (as needed.)
- Ability to practice branch security by consistently protecting client confidentiality and privacy;

### **Skills and Abilities**

- Excellent communications and interpersonal skills;
- Effective organizational, multi-tasking and prioritizing skills;
- Self-starter; ability to work in a team and independent environment;
- Proficiency with Microsoft Word, Excel, Outlook, Windows;
- Eagerness and willingness to learn a variety of tasks;
- Work overtime as needed and/or requested by management.
- Self-motivation, with strong attention to detail and excellent organizational skills;
- Strong math and keyboarding skills;
- Ability to maintain discretion and confidentiality;
- Ability to prioritize and manage multifunctional tasks in a timely manner;
- Self-starter; ability to work in a team and independent environment;

### **Education and Working Requirements**

- High school graduate, college degree or work experience equivalent
- Banking Experience: 2+ years preferred;
- Client Service 2+ years preferred;

### **Working Conditions**

Must be able to stand and/or sit for extended period of time. Occasional heavy lifting required. Job requires employee to bend forward by bending forward at the waist, or by bending the legs and spine. Must be able to express ideas by the spoken word, and requires perception of speech.

### **Eagle Rock Bank offers a comprehensive benefit package to our part-time time employees:**

- Medical \* Dental \* Vision
- Paid Time Off
- Paid Federal Holidays
- Life Insurance
- Short Term and Long Term Disability
- Flexible Spending Accounts
- 401k Retirement Savings Plan
- Employee Referral Program
- Educational Assistance
- Employee Birthday Pay
- Employee Wellness Allowance

*Eagle Rock Bank is an Equal Opportunity Employer*

<https://www.eaglerock.bank>