



TRAVERSE CITY STATE BANK Job Description

JOB TITLE: Client Service Representative

REPORTS TO: Branch Officer

SUPERVISES: N/A

FLSA Status	Non Exempt
Grade:	7
Last Revision Date:	July 2017

A. SUMMARY (General Purpose of the Job):

A Client Service Representative (CSR) with TCSB is often the first contact for our clients. This position requires awareness and the responsibility of greeting everyone entering the branch and providing prompt and efficient service such as processing bank transactions, managing a cash drawer and identifying opportunities to offer customers additional products and services. A Client Service Representative may work a variety of schedules, including weekdays and some weekends.

B. Essential Functions:

- ◆ Accurately processes transactions (check cashing, depositing, withdrawals, payment collecting).
- ◆ Identifies client needs as they relate to available bank products. Inform customers of available bank products and refer to other experts within the bank as necessary.
- ◆ Acceptable attendance and punctuality as outlined the employee handbook for purposes of efficiency and security.
- ◆ Adhere to all applicable regulatory compliance and personnel policies in the fulfillment of the specific duties of the position, including Bank Secrecy Act (BSA), Confidentiality, Information Security, and Ethical Standards

C. Additional Responsibilities:

- ◆ Participates as assigned in overall Branch operation functions; such as, answering phones, filing, vault and supply maintenance
- ◆ Meets or exceeds individual objectives in alignment with Corporate Strategic Plan
- ◆ Civic-mindedness to support and participate in the Bank’s community involvement culture
- ◆ Maintains professional, business-like appearance

D. Knowledge, Skills, Experience and Education:

- ◆ Must be at least 18 years of age
- ◆ High School Diploma or GED
- ◆ Cash handling, customer service and inside sales experience
- ◆ Well developed social skills to contribute to a positive, cooperative and flexible environment to support a service-oriented team of dedicated professionals.
- ◆ Excellent verbal communication and customer service skills
- ◆ Must be able to operate computer and navigate related software required for the position function.

E. Internal/External Contacts:

- ◆ Initial contact for clients and public entering the branch
- ◆ Provide service to other staff members as needed to appropriately service the client
- ◆ Able to get along with diverse personalities, tactful, mature, flexible.

F. Work Environment and Physical Demands:

The physical demands described 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.

- ◆ The worker is not substantially exposed to adverse environmental conditions except when handling vault duties where the worker is subject to elevated noise levels when the coin sorter is in operation. (The noise level is sufficient to cause the employee to elevate their voice.)
- ◆ The work is generally light. Worker stands the majority of the time. Job includes stooping, kneeling, crouching, crawling, reaching, standing, walking, pushing, pulling, fingering, talking, hearing, lifting (bags of coin and cash drawers), and repetitive motion. Worker must be able to express and exchange ideas with customers by means of the spoken word. Worker must be able to receive detailed information through oral communication. The worker is required to have visual ability to perform activities such as preparing and analyzing data, transcribing, viewing a computer terminal and reading procedures.

The above information on this description has been designed to indicate the general nature and level of work performance by employees within this classification. It is not designed to contain or be interpreted as complete inventory of all duties, responsibilities and qualifications assigned to this job.

Reviewed on: _____

Employee: _____ Supervisor: _____