

JOB DESCRIPTION

Job Title	Senior Personal Banker		
Reports to	Branch Manager	EE Type	Exempt

POSITION PURPOSE

The Sr. Personal Banker is responsible for attracting, retaining, and expanding client relationships while delivering an exceptional customer experience. He/she will deliver substantial financial results through outreach, relationship building, and cross selling activities. The Sr. Personal Banker will actively participate in performance, presentation, and reflective coaching activities to consistently improve. He/she are responsible for completing all operational processes in a timely and proficient manner while ensuring compliance with policy and procedures, risk, and regulations.

COMPETENCIES

- **Change Orientation** - Displays openness to change with a positive attitude.
- **Coaches and Develops** – Assists in training new team members and monitors employee progress on an individual basis. Responds to requests for advice and provides resources as necessary.
- **Customer Focus** – Understands the needs of our customers and seeks clarification as needed. Responds to customers in a professional and knowledgeable manner by establishing a rapport and demonstrating the ability to create customer loyalty. Takes steps to enhance understanding and appreciation of our customer's expectations. Works to meet current needs and anticipate future needs of our customers.
- **Accountability** – Takes personal responsibility and ownership for meeting commitments and demonstrates a high level of commitment.
- **Teamwork** – Works cooperatively and collaboratively with others and supports the success of the overall team and Bank. Participates as a team member; follows through on commitments; shares information and resources with others to further their success; supports decisions 100% regardless of personal viewpoint.
- **Values and Respects Others** – Encourage and support diversity of thoughts and perspectives of teammates. Demonstrates honest ethical behavior at all times; treats all people fairly and makes them feel valued. Build positive relationships with all Bank employees.

PRINCIPLE ACCOUNTABILITIES

Profitability

- Grow core deposit balances through relationship expansion and attraction activities.
- Retain and expand high value bank relationships
- Uncover additional client needs and identify opportunities that increase existing personal and business growth.
- Maximize income by improving fee collection, minimizing fee waivers and reducing rate exceptions.
- Proactively seek beneficial lending opportunities as determined by the bank.

Excellence

- Deliver exceptional client experience, measured by BBG customer service standards.
- Ensure that the "Relationship Building Model" is used during client interactions.
- Communicate with clients, business partners, and co-workers in a timely and professional manner.
- Assist customers with requests, complaints, and follow-up on details to resolve matters to the customer's satisfaction.

Outreach

- Conduct "Telecare" calling activities to expand client relationships.
- Attract new clients by arranging and conducting Bank @ Work presentations.
- Build relationships with centers of influence to help grow your business.
- Conduct joint calling with Branch Manager to clients, prospects, and community organizations.

Productivity

- Actively refer clients to Mortgage and Wealth Management to meet or exceed goals.
- Collaborate with business partners to maximize client growth opportunities.
- Determine and execute necessary activities to meet or exceed agreed upon goals.
- Track, review, and communicate individual progress in a timely and comprehensive manner.

Leading and Learning

- Continually strive to improve performance through individualized activity plans and reflective coaching.
- Construct and implement a learning and development plan for professional growth.
- Comprehensive knowledge of products, services, and all bank systems necessary to perform job duties.
- Act as a leader within regular sales meetings, huddles, and contests.
- Make sound business decisions during a Branch Manager's absence.

Efficiencies

- Ensure compliance with all risk, regulations, policies, and procedures.
- Perform all operational processes in a timely and proficient manner.
- Consistently follow bank security procedures and dual control at all times.
- Perform teller duties based on the needs of the location.
- Demonstrate speed, efficiency and dependability.

Perform other responsibilities as assigned

Knowledge Preferences: Undergraduate Degree and + 2 years banking experience