



## JOB DESCRIPTION

**Position Title:** Assistant Branch Manager

**Location:** Sodus

### General Summary:

Assists in organizing, planning, and directing the functions of a full service Branch Office. Ensures that member sales and service functions provided are consistent with Reliant's corporate culture statements and practices. Ensures that established policies and procedures are followed. Actively promotes and participates in the sales and service process with members and staff.

Coaches and trains branch staff and assists with periodic performance evaluations. Is actively involved in observing staff to ensure prompt, professional, and accurate responses.

Provides leadership to staff. Fosters the team building and working relationship process among staff through coaching, mentoring, and training sessions. Makes business calls to prospective and existing business affiliates. Represents the Credit Union at designated civic, service, and other meeting functions within the community.

Understands and follows expectations of Reliant's corporate culture. Leads by example in the consistent demonstration of accountability, respect, and teamwork. Provides quality service and strives to exceed service expectations. Acts in professional, friendly manner at all times. Completes work timely and accurately.

### Duties & Responsibilities:

*The following duties and responsibilities for this position are not all inclusive; others may be required or assigned.*

- \*1. Assure a full range of Reliant products and services are provided to members within the context of Reliant's corporate sales and service culture.
- \*2. Assist with the resolution of loan delinquency problems and collection matters by making contact with members when appropriate.
- \*3. Enforce established compliance measures against internal and external fraud. Ensure adherence to identification/security procedures. Complete monthly branch audit.
- \*4. Handle difficult and/or sensitive member concerns as priority items to assure timely and fair resolutions. Handle operational issues with a sense of urgency. Communicate concerns to manager.
5. Serve as the point person for the Teller Supervisor. Work directly with the Teller Supervisor to ensure that the teller line is running smoothly and staff are complying with Reliant's policies and procedures.
- \*6. Assist with the oversight of departmental staff:
  - a. Prepare coverage schedule; track and approve attendance, STA, and vacation time, and monitor, prepare and forward payroll changes.
  - \*b. Develop and motivate staff to work as a team to achieve goals.
  - \*c. Coach and train staff to develop an effective level of product knowledge, service, sales ability, and interpersonal skills.
  - \*d. Work with manager to prepare and conduct performance evaluations and regular one-on-one coaching sessions with staff, including routine functional observation to ensure a high level of service.

- \*e. Address performance issues. Works with the manager on serious performance issues to determine appropriate disciplinary action.
- \*f. Assist with regularly scheduled team meetings to keep staff informed, discuss matters of common interest or concern and resolve problems.
- \*g. Train and delegate various operational responsibilities to staff, retaining accountability for functions assigned.
- \*h. Conduct employment interviews and works with the manager to make hiring decisions for vacant positions within the department.
- i. Audit sales trak information for accuracy with reporting.
- j. Review new and updated procedures with staff and ensure staff understand and comply.
- \*7. Provide feedback for annual planning and review of deposit, loan, and other sales and performance goals. Assist the manager with implementation, monitoring, and achievement of these goals within the department.
- 8. Regularly introduces Reliant T services to members and prospective members outside of the credit union offices through presentations at local businesses/organizations and participation at community events to help build Reliant's membership.
- \*9. Consistently apply credit union policies, practices, and procedures. Understand and use good judgment and authorization to act within established guidelines.
- \*10. Assist co-workers with the familiarization of credit union services, routines, and operations as appropriate. Develop sound and compatible working relationships with staff at all levels within the organization.
- \*11. Identify and communicate opportunities and strategies for process improvement, product enhancement and development, enhanced service, cost containment, and other such issues related to the well-being and success of the credit union, including reviewing fee rebates, closed accounts, and loan corrections.
- \*12. Review volume and quality of loans taken by MSRs. Monitor withdrawn and pending loans, ensure staff are following up in a timely manner.
- \*13. Perform the full range of teller and MSR functions as needed. Is a resource for staff and can use on-line manuals effectively.
- 14. Complete quarterly goals and accomplishments. Assist with strategic planning.
- 15. Work with the Branch Manager to ensure that the branch office balances all transactions at the close of the business day, and assist staff to resolve out-of-balance problems. Schedule and conduct "surprise audits" as necessary to verify the accuracy of vault cash, teller balances, etc. Responsible and accountable for accurately maintaining all branch office records and providing required reports in a timely manner.
- 16. Serves as a back up for the Branch Manager to ensure that the branch office is open and ready to conduct business each business day.
- 17. Ability to work a flexible schedule including extended hours and some weekends and evenings.

*\*Indicates an essential function of this position.*

### **Required Knowledge, Skills and Abilities:**

1. Strong written and verbal communication skills.
2. Strong interpersonal and leadership skills.
3. Demonstrates sound judgment, trustworthiness, and confidentiality.
4. Strong sales skills with the ability to create and lead sales promotions effectively.
5. Self-starter with the ability to work independently while supporting an overall team effort.
6. Possesses the ability to work in a fast-paced, multi-task, work environment.
7. Effective organizational, prioritization, analytical, problem-solving, and time management skills.
8. Demonstrates a positive outlook in supporting Reliant's Mission and Corporate Culture, and demonstrates accountability, respect, and teamwork on a daily basis.

9. Effective personal computer skills, with demonstrated proficiency in word processing and spreadsheet applications (familiarity with Microsoft Office suite preferred).
10. Ability to work a flexible schedule including evenings, Saturdays, and Sundays.

### **Minimum Training and Experience:**

1. Associates Degree in Business Administration or related field, or at least 5 years of progressively responsible work experience required.
2. At least three years of progressively more responsible experience within a financial services organization which has provided opportunity to gain the necessary experience and background to assist with managing a full service branch.
3. Minimum of three years consumer financial sales experience desired, utilizing consultative needs identification approach.
4. Three years of hands-on supervisory and coaching experience.

### **Physical Requirements**

1. Ability to lift a minimum of 20 lbs.
2. Ability to sit and stand for extended periods of time.
3. Ability to use keyboard, monitor, telephone, and other standard office equipment.
4. Effective personal computer skills: word processing, spreadsheet, database, and report development.
5. Ability to communicate effectively with others in person, via telephone, and written communications.
6. Ability to decipher data contained in documents, reports, spreadsheets, etc. presented both on paper and electronically.
7. Ability to drive within the credit union's service areas, with a valid NYS driver's license.
8. Ability to use hands to finger, handle or feel objects, tools, controls.

### **To Apply:**

Email or mail your resume and cover letter to:

careers@reliantcu.com

Attn: Careers  
10 Benton Place  
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