



## JOB DESCRIPTION

**Position Title:** Branch Supervisor  
**Location:** Geneva, NY

### **General Summary:**

Position is part of the Member Services retail sales and service team and is responsible for the scheduling of branch staff, assisting with coaching, training, and development of Member Service Advisors. Functions as branch supervisor and oversees branch operations as needed. Performs a full range of Member Service Advisor (MSA) functions, and consistently provides exceptional service to members and staff. Demonstrates leadership in a team environment. Understands and follows expectations of Reliant's corporate culture. Consistently demonstrates the attributes of accountability, respect, and teamwork. Provides quality service and strives to exceed service expectations. Acts in a professional, friendly manner at all times. Completes work timely and accurately.

### **Duties & Responsibilities:**

*The following duties and responsibilities are normal for this position. They are not to be construed as exclusive or all inclusive; others may be required or assigned.*

1. \*Supervises the branch team. Holds team meetings as necessary to keep staff informed and engaged. Provides input for staff one on ones and performance evaluations, and participates in related discussions as needed. Investigates balancing differences to locate error(s). Follows through to ensure members' accounts are adjusted timely and properly.
2. \*Identifies, communicates, and addresses inconsistencies in procedures and practices to improve consistent service delivery. Ensures staff follow proper procedure, audit, and compliance requirements. Routinely reviews requirements with staff to ensure consistency of operation. Offers input to Branch Manager when situations or opportunities for improvement are identified.
3. \*Actively promotes Reliant throughout the retail store, interacting with customers and store employees to build rapport, develop connections, understand their financial needs and be able to serve them.
4. \*Functions in an MSA capacity on a regular basis, leading by example in the area of exceptional service delivery and effective consultative sales techniques.
5. Assists manager with coaching branch team to meet high sales and service standards, including participation in sales and service incentive programs. Assists with preparing sales and other activity reports.
6. \*Oversees the activities of the MSAs by assigning work, answering questions, solving problems, and dealing with complex transactions and sensitive member relations. Handles elevated member concerns to ensure resolution.
7. \*Coordinates and manages staff work schedules to ensure proper branch coverage, high quality service to members, and effective use of resources. Assists the Branch Manager with monitoring and controlling staff overtime.
8. \*Coordinates and participates in branch outbound sales and service initiatives. Makes outbound telephone calls to acquire additional member business and enhance service quality.
9. \*Contributes to the annual Performance Plan and goal setting process. Supports and reinforces the credit union's strategic areas of focus.

10. Assists with branch cash management, including ordering and verifying branch cash, keeping within acceptable cash levels, filling cash orders, and maintaining full vault security. Assists with the daily and monthly balancing and settlement of vault, cash recyclers, and drawer audits.
11. Participates in the screen interview process for potential candidates. Participates in the selection, training, and development of branch staff under the supervision of the Manager.
12. Assists Branch Manager to ensure maintenance of adequate inventory and completion of monthly branch audits including gift cards, money orders, official checks, and promotional items.
13. \*In absence of Branch Manager, ensures that branch office is open and ready for service at the beginning of the day, and properly closed and secured at the end of the day.

#### **Overview of Member Service Advisor Responsibilities:**

1. \*Performs routine member transactions, opens/modifies accounts, discusses products and services, and conducts loan interviews, ensuring use of and delivery of proper documentation.
2. \*Assures a full range of Reliant's products and services are provided to members within the context of Reliant's corporate culture. Actively discusses and refers Reliant's products and services with members and potential members. Provides routine information, explains credit union services, and identifies ways to improve members' financial lives by saving them time and/or money.
3. \*Responds to members' requests, problems, and concerns and/or directs them to the proper person for specific information and assistance.
4. \*Handles money and negotiable instruments in a professional, confidential, and accurate manner.
5. \*Interprets system data and reports to provide members with account status and transaction history.
6. \*Safeguards Reliant and our members from fraud and identity theft by examining checks for proper endorsements and negotiability and following check cashing, hold, and member identification procedures.
7. \*Follows established security and operational procedures at all times.
8. \*Utilizes credit skills of interviewing and accepting loan applications. Understands lending and credit decision process. Discusses various lending services to sell credit products and build member relations effectively. Takes ownership of situations such as loan closings, loan follow up, etc., and communicates the outcome to the appropriate individuals.
9. \*Counsels members on appropriate use of their accounts in order to avoid unnecessary overdraft fees. Actively makes contact with members who are overdrawn to make payment arrangements and documents all discussions with members.

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

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

1. Effective written and verbal communication skills.
2. Effective interpersonal and leadership skills.
3. Demonstrates sound judgment, trustworthiness, and confidentiality.
4. Strong sales skills with the ability to effectively create and lead sales promotions.
5. Self-starter with the ability to work independently while supporting the overall team effort. Possesses the ability to work in a fast-paced, multi-task, work environment.
6. Effective organizational, prioritization, analytical, problem-solving, and time management skills.
7. Demonstrates a positive outlook in supporting Reliant's Mission and Corporate Culture, and demonstrates accountability, respect, and teamwork on a daily basis.
8. Effective personal computers skills, with demonstrated proficiency in word processing and spreadsheet applications (familiarity with Microsoft Office suite preferred).
9. 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 2 years of progressively responsible work experience required.
2. A minimum of 1 year Supervisory experience desired.
3. At least 2 years of sales and cash handling experience in a financial services and/or retail environment preferred.

### **Physical Requirements**

1. Ability to lift a minimum of 20 lbs.
2. Ability to stand 75% of the time and regularly travel throughout the retail store.
3. Ability to use keyboard, monitor and other standard office equipment.
4. Ability to communicate effectively with others in person and via telephone, email, and written documents.
5. Ability to decipher data contained in documents, reports, spreadsheets, etc., presented both on paper and electronically.
6. Ability to provide own transportation and drive within the credit union's service area, with valid NY State driver's license.
7. Must be capable of regular, reliable, and timely attendance.

### **To Apply:**

Email or mail your resume and cover letter to:

careers@reliantcu.com

Attn: Careers  
10 Benton Place  
PO Box 40  
Sodus, NY 14551