Position: Part-time, On-call Customer Experience Specialist
Reports To: SVP of Retail Sales
FLSA: Non-Exempt
Location: Flexibility to work at any location

Position Summary

The Part-Time, On-Call Customer Experience Specialist supports daily branch operations by creating a welcoming and professional first impression for customers, vendors, and coworkers. The position greets and directs customers in person, by telephone, and by email; assists with lobby, mail, courier, supply, and administrative responsibilities; and completes assigned opening and closing duties in accordance with Bank procedures, the Mission Statement, and Core Values.

During the initial training period, this position will work part-time hours at each Bank location for several weeks to become familiar with location-specific procedures, workflows, systems, and coverage responsibilities. Following completion of training, the position will transition to an on-call, as-needed schedule based on operational needs, with a consistent Friday afternoon telephone coverage rotation shared with another part-time, on-call Customer Experience Specialist. Hours and work location may vary. The role requires flexibility, dependability, sound judgment, and the ability to follow established written procedures while protecting customer and Bank information.

Essential Functions:

Customer Experience and First Impressions:

- Represent the Bank professionally by maintaining confidentiality, a positive attitude, punctuality, adaptability, and a customer-focused approach.
- Greet and assist customers, vendors, and visitors promptly and respectfully, and direct them to the appropriate team member or department.
- Answer and route telephone calls using a clear, professional greeting; monitor and respond to assigned voicemail and branch email; and maintain ownership of the customer experience through an accurate handoff.
- Maintain a welcoming lobby environment, including customer seating, reading materials, refreshment areas, customer-facing equipment, and other shared spaces.

- Maintain general knowledge of Bank products, services, and departments to answer basic questions and connect customers with the appropriate resource.

Team and Coverage Support

- Work cooperatively and respectfully with team members across Bank locations and departments.
- Adapt to changing branch priorities and shift between customer service, administrative, supply, and facility-related tasks as coverage needs change.
- Ask questions when instructions or authority are unclear and promptly communicate customer, operational, security, or facility concerns to the appropriate supervisor.
- Complete initial training at each Bank location and all required compliance, safety, systems, and position-specific training.
- Attendance at daily huddles is encouraged when the employee is scheduled to work during morning and opening hours.
- Attendance at quarterly celebrations and other Bank events is encouraged when scheduling permits.
- Employees are encouraged to assist with Highlander and Heritage Club events. Time spent participating in or supporting these events will be paid.

Compliance and Risk Management

- Maintain knowledge of and comply with applicable Bank policies, procedures, and regulatory requirements, including BSA, the USA PATRIOT Act, and OFAC requirements relevant to assigned duties.
- Protect the confidentiality and security of customer, employee, transaction, and Bank information at all times.
- Perform assigned duties accurately and securely and escalate exceptions, unusual activity, or errors according to Bank procedure.

Skills and Competencies

- Prior banking experience is helpful but not required.
- Clerical, administrative, reception, or customer service experience is preferred.
- Ability to provide courteous, personal attention and remain professional during challenging interactions.
- Basic computer proficiency, including internet, email, Microsoft Word, and Microsoft Excel.
- Ability to learn and use Bank telephone, communication, email, and operational systems required for assigned duties.
- Must be bondable.
- Demonstrated integrity, discretion, reliability, organization, and attention to detail.
- Ability to work independently with written procedures and limited supervision while knowing when to seek assistance.

- Ability to prioritize responsibilities and adjust to changing coverage and operational needs.
- Availability to work part-time hours at each Bank location during the initial training period, followed by an on-call, as-needed schedule that includes participation in a Friday afternoon telephone coverage rotation with another part-time, on-call Customer Experience Specialist and may include opening, closing, and coverage at different Bank locations.

Physical Demands

- Normal office environment
- Extended PC viewing, keyboarding with periods of sedentary work
- May be required to stoop, kneel, stand, walk, talk, hear, reach with hands and arms
- May be required to occasionally lift/move up to 30 pounds

The physical demands noted above are representative of those that must be met by an employee to successfully perform the essential function of the position. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

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Employee Signature Date