



Position: Customer Experience Specialist
Reports To: Retail Operations Supervisor
FLSA: Non-Exempt
Location: Whitefish

Position Summary

The primary responsibility of the Customer Experience Specialist position is to greet and direct customers both in-person, by telephone, and by email within the Three Rivers Bank's locations in accordance with the organization's Mission Statement and Core Values. Additionally, this position will provide clerical and administrative support to various departments within the Bank including ITM (Interactive Teller Machine) Tellers and Personal Bankers. The position reports to the Retail Operations Supervisor.

Essential Functions

- Represent Three Rivers Bank in a professional manner which includes a professional image, confidentiality, a positive "can-do, get it done" attitude, good attendance, punctuality, flexibility, and adaptability in meeting bank and customer needs.
- Greet and direct customers using professional demeanor at all times. This includes walk-in, email, telephone, or through ITM machines. Ensure customers are treated with a high degree of friendliness always striving to meet the customer's requests.
- Correctly and efficiently transfer calls to the appropriate team member.
- Performing open and closing procedures including ensuring telephones are turned on daily at 8:00 a.m. and changed to Night Service at 5:00 p.m. and coordinating automatic door locks for opening at 9:00 a.m. and closing at 4:00 p.m. Monday – Thursday and closing at 5:00 p.m. on Fridays.
- Assisting customers with operating ITM's to complete deposits, cash checks, and make loan payments. Help customers who request counter checks, cashier's checks, debit card orders and pin changes, change order requests, and providing Online banking support by setting up new users and unlocking account access.
- Verification of Wire Transfers to Customer accounts.
- May be asked to become a Notary Public to provide notary services for bank customers.

- Collect, sort, log, and correctly distribute incoming mail and packages.
- Manage bank returned mail and log all packages according to bank procedure.
- Responsible for setting up any lobby customer thank you events – cookies or other items available during certain events.
- Maintain knowledge of banking products and services with the ability to make recommendations to customers in order to cross sell products.
- Must provide superior internal and external customer service: must demonstrate self-governance, courtesy, and respect toward all external customers and vendors as well as internal customers (Team Members)
- Maintaining knowledge of Bank policies and procedures, applicable laws and regulations/compliance requirements including but not limited to the Bank Secrecy Act, the Patriot Act and the Office of Foreign Assets Control.
- Adherence to the Advantage Business model and being Montana Tough.

Additional Responsibilities

- Work in conjunction with all TRB facilities staff, balancing business needs, supplies, and tasks.
- Must have the flexibility to work the open to close shift by clearing and opening the bank for employees before bank hours and/or closing the bank at the end of the day.
- Oversee the supply room, ordering supplies as requested from staff and ensuring supplies are adequately maintained while not overstocking. Supply areas are maintained in a neat and orderly fashion.
- Credit card payment processing in Client Link.
- Provide administrative and clerical support as needed for other departments such as tracking in-house training, working on projects or reports, or Officer Call Tracking.
- Assist lenders with customer communications as requested.
- Send out birthday cards for Lenders customers'.
- Provide new Team Members with Microsoft Teams Chat Function and Shortel Phone System Training.
- Maintain lobby seating area by updating reading materials and reviewing publications for bank and competitor ads.
- Keep water and coffee area clean and stocked.
- Complete required compliance and educational training annually.
- Participation in Bank Committees as assigned or requested.
- Participate in a minimum of two Heritage Club events annually.
- Participate in two Highlander Cross Country or Track events annually.
- Participate in two other Bank sponsored community events per year.

Skills and Competencies

- Prior Banking experience helpful.
- Minimum of one year clerical/administrative experience.

- Must be able to provide courteous, personal attention to promote individual customer satisfaction and the public perception and reputation of the organization. Treats all customers with respect even in the most negative situation.
- Computer proficiency required – ability to use internet, email and Microsoft Office Word, Excel and provide backup for the ITM Teller during breaks.
- Must be bondable.
- Must be able to conduct oneself in a manner that promotes trust in the individual and our organization.
- Must maintain confidentiality at all times due to the nature of information about customers and transactions.
- Work cooperatively and respectfully with all Bank Team Members.
- Self-directed – must be able to fulfill the responsibilities of the position with minimal supervision.
- Must be able to prioritize and organize responsibilities to maximize productive results.

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 notes 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.

Employee Signature

Date

