



**Position:** Universal Banker/Teller Supervisor  
**Reports To:** SVP of Retail Sales  
**FLSA:** Exempt  
**Location:** Oversight over Idaho, Meridian, and Whitefish offices

### Position Summary

The Universal Banker/Teller Supervisor leads the day-to-day performance of Universal Bankers and Tellers (including ITM) across assigned locations, ensuring consistent teller operations and system execution aligned with the Bank's Culture and Core Values. This role sets clear performance expectations, drives accountability, and partners with location leadership to deliver consistently high-quality customer experience. The Supervisor coordinates schedules to ensure appropriate coverage, plans for peak-volume needs, and helps teams serve customers efficiently and accurately. Through clear communication and ongoing coaching, this position reinforces strong performance while maintaining attention to detail in a fast-paced environment. The Universal Banker/Teller Supervisor remains actively engaged with customers, team members, and vendors to resolve system issues, coordinate maintenance, and ensure timely resupply, representing the Bank with professionalism and courtesy. By modeling behaviors that strengthen the Bank's brand, improving operational efficiency, and supporting a sales-and-service culture through product advocacy and Bank-sponsored community involvement, the Supervisor helps teams achieve meaningful results. This position reports to the SVP of Retail Sales.

### Essential Functions

**Lead and ensure consistent execution of all Teller operations, including:**

- Teller team and teller platform: ensure team readiness and consistent use of systems, controls, and service standards.
- Select, onboard, mentor, and develop teller talent; address performance and conduct issues promptly and professionally, including corrective action when appropriate.
- Address team concerns and resolve personnel matters promptly, partner with the Retail Operations Manager for guidance and escalation, as appropriate.
- Manage teller supply inventory levels and ordering controls; maintain an up-to-date reference for approved vendors, order points, and ordering procedures to support uninterrupted service.
- Manage and balance teller cash levels in accordance with Bank policy to minimize risk and support customer needs (e.g., ATM, vault, TCR, ITMs, and ITM cash teller cash exposure).
- Oversee the Regulation CC hold process by reviewing, documenting, and maintaining accurate logs for monthly Compliance Committee review.
- Address customer comments and complaints promptly and with accountability; follow up with the customer and provide timely coaching and feedback to tellers to help prevent recurrence.
- Coordinate Federal Reserve cash orders and shipments accurately and on schedule to support customer demand and operational readiness.
- Prepare clear, timely management reports and memoranda that summarize results, identify risk items, and document action steps.

- Maintain strong cash controls end-to-end by reinforcing standards, monitoring adherence, and correcting exceptions to protect customers and the Bank.
- Maintain and improve teller procedures, as needed, to support consistent execution, compliance, and a positive customer experience.
- Maintain teller documentation and records in accordance with retention guidelines to ensure files are complete, accurate, and audit-ready.
- Set the standard for security and dual control by ensuring consistent adherence and addressing any exceptions immediately.
- Model and reinforce key requirements to protect customers, team members, and the Bank, including:
  - Dual control—follow dual-control procedures for all applicable transactions.
  - Customer confidentiality—protect customer information at all times.
  - Workstation security—lock and secure workstations whenever unattended.
  - Customer identification—verify identity and follow required steps for each transaction.
  - Digital product proficiency—be able to explain online banking and mobile deposit features to support adoption and enhance the customer experience.
  - Alert management—review and act on account and customer alerts for each transaction, as applicable.

**Provide consistent coaching, including:**

- Champion Kasasa as the core deposit relationship by coaching Tellers/Universal Bankers to clearly communicate benefits, drive adoption, and deepen customer relationships.
- Drive accountability to performance and risk controls by following up on exceptions and requirements (e.g., non-posts, hold exceptions, OFAC, teller differences, and timely completion of required education).
- Coach a consistent customer-first experience by acknowledging customers promptly and maintaining professional, relationship-building interactions in person and by phone.
- Stay current on banking compliance and regulatory standards; reinforce expectations through daily coaching and checkpoints.
- Provide direct leadership for the Teller team by setting expectations, coaching in real time, and reinforcing service and sales behaviors. At times having difficult conversations.
- Conduct required annual performance reviews and quarterly check-ins by recognizing performance, addressing gaps, and documenting clear action plans.
- Track performance metrics and set clear goals that support a strong sales-and-service culture and operational excellence.
- Maintain appropriate staffing and coverage based on customer volume and planned needs (e.g., training, time off, and meetings) to support consistent customer experience.
- Ensure Teller training is completed, understood, and applied by reinforcing standards, building proficiency, and addressing skill gaps.
- Communicate proactively with the team on procedural updates, compliance requirements, and regulatory items; ensure expectations are understood and executed consistently.
- Maintain strong product knowledge and coach the team to identify needs, make relevant recommendations, and deepen relationships through cross-sell.
- Deliver excellent service while operating within Bank policies, regulations, and procedures by balancing speed, accuracy, and compliance on every interaction.

### **Additional Responsibilities**

- Provide teller-window coverage as needed to maintain service levels and customer experience (e.g., team member illness or vacation coverage).
- Maintain versatility across roles—support ITM, Teller, and CES coverage as needed to ensure consistent execution and a seamless customer experience.
- Support teammate development by participating in career development planning and coaching growth opportunities.
- Monitor teller and drive-up equipment performance; evaluate options and recommend upgrades or replacements, as needed, to support reliable and efficient service.
- Partner with the SVP of Retail Sales to plan and manage the annual budget for team education and equipment needs.
- Complete all required annual education and compliance training on time and apply learning to daily execution.
- Represent Retail by participating in Bank committees and contributing to cross-functional outcomes.
- Provide practical, front-line input to strengthen policies and procedures—focused on customer experience, risk control, and consistent execution.
- Approve and authorize customer transactions within established authority limits, ensuring accuracy, compliance, and a positive customer experience.
- Participate in Heritage Club, Highlander Track, and other Bank-sponsored community activities, with a goal of participating in six or more activities annually.
- Maintain flexibility to work 40 hours per week, Monday–Friday, with additional evening and weekend hours as needed to meet deadlines and achieve objectives.

### **Skills and Competencies**

- Preferred experience in banking operations, with emphasis on deposit products and teller operations.
- Beneficial to have broad banking exposure (e.g., lending and accounting).
- Demonstrated problem-solving skills, with the ability to resolve issues and proactively develop solutions.
- Must be bondable.
- Computer proficiency required, including the ability to use the internet, email, and Microsoft Office (Word and Excel).
- Professional, trustworthy, and customer-focused.
- Commitment to confidentiality and accuracy.
- Highly organized with attention to detail.
- Demonstrate flexibility by performing other duties as assigned.
- Exhibit strong independent work skills and effectively prioritize tasks with minimal supervision.
- Demonstrates effective collaboration with team members.
- Upholds the bank's goals and values.
- Maintains a professional work environment.
- Adheres to scheduled shift times with punctuality.
- Exhibits strong communication skills.
- Shows receptiveness to coaching and displays humility.

**Physical Demands**

- Normal office environment.
- Extended PC viewing and keyboarding, with periods of sedentary work.
- May be required to stoop, kneel, stand, walk, talk, hear, and reach with hands and arms.
- May be required to occasionally lift and/or move up to 50 pounds.
- Travel is required within the market area.

The physical demand 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.

Team Member Signature \_\_\_\_\_

Team Member Printed Name \_\_\_\_\_

Date: \_\_\_\_\_