



Position: Customer Experience Specialist
Reports To: SVP of Retail Sales
FLSA: Non-Exempt
Location: Meridian Office with flexibility to work in other location(s)

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 Bank's locations in accordance with the organization's Mission Statement and Core Values. Additionally, this position provides clerical and administrative support to various departments within the Bank.

This role serves as a critical first point of contact and is responsible for delivering a consistent, high-quality customer experience while supporting relationship development through a service-based sales approach. The position reports to the SVP of Retail Sales.

Essential Functions:

Customer Experience and First Impressions:

- Represent the Bank in a professional manner, maintaining a professional image, confidentiality, a positive attitude, strong attendance, punctuality, and adaptability.
- Greet and engage customers across in-person, phone, and electronic channels with a welcoming, professional demeanor.
- Deliver excellence in phone etiquette by:
 - Answering calls promptly with a clear, professional greeting
 - Actively listening and communicating effectively
 - Ensuring accurate routing while maintaining ownership of the customer experience.
 - Create a welcoming and respectful environment aligned with the Bank's Mission and Core Values.

- Maintain knowledge of banking products and services to identify opportunities and support cross-sell recommendations.

- Apply a relationship-based service approach using the Emmerich Group 7-Step Sales Process:
 1. Build Rapport – Greet each customer with warmth and professionalism
 2. Ask Questions – Use purposeful questions to understand needs and goals
 3. Identify Needs – Listen actively to uncover opportunities
 4. Present Solutions – Connect needs to appropriate products/services
 5. Ask for the Business – Confidently recommend next steps
 6. Handle Concerns – Address questions with clarity and empathy
 7. Confirm Next Steps – Ensure follow-up or proper handoff
- Treat sales as a form of service, focused on building long-term customer relationships
- Consistently meet or exceed performance expectations related to customer experience measurement tools, including:
 - Mystery shopping programs
 - Internal quality reviews
 - Service and communication standards

Operational & Administrative Support

- Perform open and closing procedures, including coordinating automatic door locks
- Provide backup support to the teller line, including:
 - Check orders and debit card requests
 - Change orders and non-cash deposits
 - Loan payments and online banking support
 - Process credit card payments through Clientlink
- Verify wire transfers and perform quality control review of work from various departments.
- Collect, sort, and distribute incoming mail and packages; manage returned mail logs.
- Provide administrative and clerical support including reporting, tracking, and assisting lenders with customer communication.

Customer Experience Environment & Support

- Coordinate lobby experience, including customer appreciation efforts and maintaining a clean and welcoming environment.
- Work in conjunction with Bank Manager to plan, organize and execute customer and community engagement events at the office, supporting relationship development, customer experience initiatives and bank visibility.
- Maintain lobby seating area, reading materials, and refreshment stations.
- Oversee supply inventory, ensuring appropriate stock levels and organization.
- Collaborate with all TRB facilities Customer Service Reps and Office Operations Coordinator, balancing business needs, supplies, and tasks.
- Provide training support to new team members on communication and operational systems as needed.

Compliance & Risk Management

- Maintain knowledge of Bank policies, procedures, and regulatory requirements including BSA, Patriot Act, and OFAC.
- Ensure confidentiality of customer and Bank information while demonstrating integrity in all interactions.

Additional Responsibilities

- Must be able to work at any of our Locations, while supporting the needs of both our External and Internal Customers.
- 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 with the tellers at the end of the day.
- 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 and Excel.
- 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