

## **Willamette Community Bank Customer Service Representative**

**Job Title:** Customer Service Representative  
**Department:** Branch Operations/Customer Service  
**Reports to:** Customer Service Manager/Operations Supervisor  
**Status:** Non-Exempt

### **PRIMARY JOB PURPOSE:**

Primarily responsible for answering customer calls; providing friendly, courteous service to customers in a professional manner; actively cross-selling bank services and products; listening to customer needs and recognizing what the bank can do to serve them better. Proactively take part in maintaining/retaining customer relationships; being an active part of the community; represent the bank at various functions and events.

### **MAJOR AND ESSENTIAL JOB RESPONSIBILITIES:**

- Provide customer service by assisting customers with statement problems, balancing issues, opening customer checking, savings, CD accounts; actively cross-sell all bank services.
- Assist customers in identifying and opening appropriate accounts and services including, but not limited to, checking, savings, CD's, online banking, bill pay, etc.
- Handle customer requests for information; stay informed and up to date on all new products and services offered by the bank.
- Take a proactive role in maintaining/retaining the deposits and loan portfolio at the branch; being an active part of the community by participating in/being a member of civic/service groups; represent the bank at various functions and events
- Assists in controlling the entry and exit of customers in the safe deposit box area.
- Greets and assists customers in a courteous and pleasant manner by assisting with their account transactions, answering customer inquiries, printing customer statements and balances, verifying account balances, and giving customer account information.
- Answers incoming calls and direct to appropriate bank personnel.
- Comply with all regulations and procedures that affect daily work.

## **JOB SPECIFICATIONS:**

### **Work Direction:**

Employee will receive daily work assignments from the Customer Service Manager. Most work falls within established policies and procedures. Employee will be responsible for follow-up on all customer calls and requests made within the branch.

### **Accountability:**

This position has access to the financial situation of bank customers. The utmost discretion and confidentiality must be exercised with all data.

## **JOB QUALIFICATIONS:**

### **Education:**

Must have a high school diploma or GED

### **Experience:**

Experience handling or working with money is required. Banking/teller /new account experience is preferred. Experience in financial product sales is preferred. Basic math skills and/or knowledge of accounting principles are required. Must have basic computer knowledge and the ability to operate an adding machine, typewriter and copier. Knowledge of operating a teller machine and coin counter is preferred as all are used on a daily basis.

Must be able to lift coin bags and boxes on a daily basis up to 25-30 pounds and carry from the vault to teller area. This position requires standing for some of the day while conducting job duties.