

JOB DESCRIPTION

POSITION TITLE: Branch Manager II

REPORTS TO: COO

EFFECTIVE DATE: October 7, 2021

Hours: 40

FLSA STATUS: Full-time, Exempt

Location: Queensgate

I. PRIMARY RESPONSIBILITIES:

The Branch Manager II will direct and supervise the staff and day-to-day operations in the assigned Branch location and the Call Center, ensuring delivery of quality member service and achievement of sales or productivity goals. This includes all incoming and outbound calls, account transactions, new accounts, and account research or maintenance. Solves problems within established policies and guidelines. Plan, schedule, supervise, and evaluate call center workflow and staffing. Coordinate call center activities to achieve desired volume according to the business plan. Assist in and monitor call volume.

II. ESSENTIAL FUNCTIONS

Supervisory Responsibilities:

- Maintain a highly motivated, well-trained staff, maintaining effective employee relations.
- Oversees the day-to-day workflow of the Branch and Call Center.
- Conducts monthly coaching sessions with staff, focusing on employee development.
- Conducts timely and constructive performance reviews, providing recommendations for promotion and salary adjustments as appropriate.
- Manage staff to set goals and performance standards.
- Monitor key performance indicators (KPI) and manage to achieve set metrics for the Call Center.

Duties and Responsibilities:

- Implement and monitor the budget for the Branch.
- Apply and evaluate policies and procedures pertinent to areas of supervision. Ensure compliance with federal laws and regulations set forth by the National Credit Union Administration and other regulatory agencies.
- Monitor activity in the Branch, including number of transactions, volume, teller errors, loan volume, teller and loan personal sales, and new accounts.
- Monitor key products and sales within the Branch and Call Center to ensure profitable and sound business practices and a high quality of service for members.
- Manage the security and safety of the Branch. Analyze and monitor security and safety policies and procedures on an on-going basis.
- Schedule adequate staff to ensure efficient operation in the Branch and Call Center. Assist in answering calls or teller line support when necessary.
- Conduct loan interviews, process, decision, and/or close loans, if needed.
- Monitor operations in the Branch and Call Center to ensure a consistent, professional approach.
- Create and maintain a cross-selling environment while fostering and engaging in a relationship building atmosphere between staff and members.
- Consistently train, maintain and improve assigned employee's skills and knowledge for efficient service delivery and high-quality member service.
- Work with internal auditor to ensure compliance with internal controls.
- Participate in recruiting and selecting quality applicants for vacancies, ensuring the Credit Union is adequately staffed with competent employees.
- Responsible for researching member inquires, complaint resolution, and assisting team with complex account problems to ensure proper follow-up and member satisfaction.
- Work closely with IT to maintain the smooth operation of the telephone system, ensuring calls are coming in correctly and answered in a timely manner. Coordinate the changing of extensions, new extension or phone lines, and maintenance of voice mail.
- Monitor calls for professionalism, accuracy, and content.
- Create and review ongoing operational reports for Branch and Call Center.

- Maintain strictest confidence in all credit union member and employee-related business.
- Treat all credit union members and employees with a positive and cooperative attitude.

III. QUALIFICATIONS AND REQUIREMENTS:

- Associate's degree and equivalent industry experience required. Bachelor's degree preferred.
- Strong multi-tasking and problem-solving capabilities with attention to detail.
- Friendly and helpful demeanor.
- Desire to continuously learn and grow. Position requires 12 to 18 months of training to learn all aspects of the position.
- Ability to give and accept instruction and the desire to oversee and assist others.
- Strong organizational skills.
- Strong verbal and written communication skills.
- Must have at least five (5) years in the retail financial services industry with at least two in a branch supervisory position and loan processing/underwriting capacity, a proven track record of meeting and exceeding expectations and objectives.

IV. BEHAVIORAL COMPETENCIES

1) Core Competencies:

- Member Focus (internal and external): Builds member confidence, is committed to increasing member satisfaction, sets achievable member expectations, assumes responsibility for solving member problems, ensures commitments to members are met, solicits opinions and ideas from members, responds to employees.
- Dependability: Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, and meets attendance/punctuality requirements.

- Integrity/Ethics: Deals with others in a straightforward and honest manner, is accountable for actions, maintains confidentiality, supports company values, communicates accurately and timely.

2) Job Specific Competencies:

- The position requires an individual who is able to maintain composure in a variety of situations.
- Leadership: Leads through change and adversity, makes the tough call when needed, builds consensus when appropriate, motivates and encourages others.
- Managing for Results: Sets challenging and productive expectations for team, keeps team accountable for actions, provides leadership and motivation, provides resources and support, uses checkpoints and data to track progress, sets up systems and processes to measure results.
- Managing Performance: Applies clear/consistent performance standards, handles performance problems decisively and objectively, is direct but tactful, provides guidance and assistance to improve performance.
- People Development: Provides feedback and coaching, rewards hard work and risk taking, takes mentoring role, challenges, and develops employees, accepts mistakes as a learning tool, provides visibility/opportunity.
- Job Knowledge: Understands duties and responsibilities, has necessary job knowledge, has necessary technical skills, understands company mission/values, keeps job knowledge current, is in command of critical issues.

V. WORK ENVIRONMENT/PHYSICAL DEMANDS

- Work is generally performed in an office environment in which there is only minimal exposure to unpleasant and/or hazardous working conditions. Must have the ability to sit for long periods throughout an eight-hour period.
- Must be able to lift as much as 20 pounds, perform work at a computer terminal for 6-8 hours a day and function in an environment with constant interruptions.

Any other duties or responsibilities management deems necessary as part of your position.

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