



JOB DESCRIPTION

POSITION TITLE:	Client Services Representative
SUPERVISOR'S TITLE:	AVP Customer Experience Specialist
DEPARTMENT:	Client Services Department
EMPLOYMENT STATUS:	Non-Exempt

The Client Service Representative will provide first level service to our customers and staff for all incoming calls and all inquiries received related to Deposit Accounts, Electronic Banking matters and basic Treasury Service. They will represent the bank in every interaction and must epitomize the bank's core values. They will have knowledge of the bank's Treasury Services and Electronic Banking products and services, as well as an overall understanding of loan and deposit products. They pride themselves on providing superior customer service and delivering an unforgettable banking experience.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Provide *AMAZING* customer service to all clients and internal employees through all channels of communication of the Client Services Department.
- Ensure customer problems and complaints are handled professionally, effectively, maintained at a minimum level, and resolved to the customer's satisfaction within policy guidelines and procedures.
- Able to perform all transactions and services necessary to meet customer and department needs, including but not limited to providing basic online banking and treasury service assistance and other duties as assigned (subject to changes as applicable).
- Recognize, document, and alert the management team of trends in customer call.
- Document all call information according to standard operating procedures.
- Route calls to appropriate resources when applicable.
- Timely participation in ongoing training.
- Adherence to the reporting and recordkeeping requirements of the Bank Secrecy Act, Anti-Money Laundering laws, OFAC, and CIP rules and regulations.
- Adherence to all policies and procedures as they relate to all other regulatory compliance laws and regulations.
- Handle complex or non-routine operational issues independently when possible, however recognizing when management support is required.
- Ensure the department is operating in a safe and effective manner.
- Reliable and regular attendance on the job.

JOB RELATED QUALIFICATIONS:

- Computer skills to include use of Microsoft Office products and other programs as required.
- Professional telephone etiquette
- Ability to handle stressful situations appropriately.
- Ability to understand every audience, even those with limited technology know-how
- Superior listening, verbal, and written communication skills.
- Great data entry and typing skills.

- Strong analytical skills.
- Outstanding interpersonal skills.
- Effective time management and organizational skills.
- Attention to detail and follow through.
- Ability to interact with coworkers, follow directions and established bank procedures, and accept constructive feedback.
- Bilingual in Spanish a plus

Education/ Licenses/ Work Experience

- High school diploma or GED equivalent required.
- 1-3 years of customer service experience required.
- Minimum six months banking experience preferred.
- Minimum six months call center experience preferred.

Physical Demands:

- The employee must be able to remain in a stationary position for sustained periods of time. The person in this position needs to occasionally move about inside the office to access file cabinets, office machinery.
- The employee is occasionally required to raise objects up to 50 pounds from a lower to a higher position, or moving objects horizontally from position to-position with, to bend body downward and forward, extending hands and arms in any direction to access files, squat to retrieve/pick up item(s).
- Consistent use of a computer and other office machinery is required, such as a calculator, copy machine, and computer printer. Making substantial and repetitive movements (motions) of the wrists, hands, and/or fingers.
- Close visual acuity is required to perform activities such as: preparing and analyzing data and figures, transcribing, viewing a computer terminal, extensive reading.
- While performing the duties of this job, the employee is regularly required to communicate verbally to clients.
- The person in this position must stay awake and alert during assigned work time.

Management reserves the right to add/change duties and job requirements at any time. This job description is not an employment contract, implied or otherwise. The employment relationship remains "at-will". Bank of Southern California (Bank) is an Equal Opportunity Employer (EEO). It is the policy of the Bank to provide equal employment opportunity to all persons regardless of age, color, national origin, citizenship status, physical or mental disability, race, religion, creed, gender, sex, sexual orientation, gender identity and/or expression, genetic information, marital status, status with regard to public assistance, veteran status, or any other characteristic protected by federal, state or local law. In addition, the Bank will provide reasonable accommodations for qualified individuals with disabilities.