



JOB DESCRIPTION

Position Title: Client Services Manager
Supervisor's Title: Branch Service Manager
Employment Status: Exempt or Non-Exempt based on branch size and staffing

CORE VALUES

- Committed to making a difference in every interaction, every day
- Relationship driven with customers and staff members
- Demonstrated trustworthiness and integrity
- Hold yourself to a higher standard and demand excellence
- Be responsive and willing to do whatever it takes to get the job done

Position Summary:

Supervise day to day operations of the branch and ensure branch staff are performing their assigned duties in a satisfactory manner. Meet and greet customers in a friendly and professional manner, while providing the customers with accurate product knowledge and services. Demonstrate proper judgment when handling customer transactions to mitigate risk to the bank. Responsible for retaining and expanding customer relationships for the Bank. Complies with and implements bank established objectives, policies and procedures and ensures compliance with all federal and state regulations.

Prerequisites:

Five years' bank operations supervisor experience. Demonstrated supervisory and training background. Proficient computer knowledge, including Microsoft Word and Excel programs. Excellent leadership and people skills, effective written and verbal communication capabilities. Dedication to teamwork and long-term commitment to success.

Essential Duties and Responsibilities:

Responsible for management, supervision and direction of all deposit operations, record keeping, check processing, funds transfers, branch certifications and other daily branch functions. Ensures duties and responsibilities assigned to various individuals are properly understood and are carried out. Make sound decisions in the absence of detailed instructions.

Maintain all automated banking operations systems, including the delegation of running systems checks, balancing each system and securing that the personnel/vendors have knowledge that the systems are operating correctly.

Manage the operational area of the bank and provide quality customer service necessary to meet customer needs, bank requirements and limits established by the bank. Make sure that customer complaints and/or problems are handled in a professional and effective manner and resolved at the branch level to the customer's satisfaction.

Be able to perform all customer transactions necessary to meet the customers needs, including accepting checking or saving deposits (with or without currency), savings withdrawals, check cashing, check endorsement verification, verification of customers' signatures and balances, sales of cashier's checks, process outgoing wire requests, and open new accounts. Assist with all back-up duties, and other duties as assigned such as handling complex or non-routine operational issues. Must have the physical ability to lift and handle coin deposits.

Identify sales opportunities through proper profiling of client needs accompanied by a complete understanding of bank products and services offered. While profiling clients, demonstrate the ability to recognize referral opportunities as well for lending and cash management services.

Ensure compliance with all federal and state regulations. Obtain a satisfactory operations and compliance review/audit with limited exceptions.

Participate in the process of interviewing and hiring branch operations personnel. Provide motivation, guidance, and training to branch operations personnel. Review job descriptions for all branch operations staff and ensure compliance with job requirements and provide goals and career paths to retain valuable staff members. Motivate and train operations staff in effective cross-selling of all customer banking products and services.

Conduct staff meetings to communicate Bank policies and procedures to minimize operating losses. Include in the staff training safety and security policies relating to the office safety, emergency preparedness, robberies and that the office is operating in a safe and effective manner.

Other objectives as assigned would include but, not be limited to, attending seminars and conferences to continue the knowledge of current and changing bank regulations and practices pertaining to the Bank's operations. Maintain personal banking skills and provide leadership in each of the Bank's critical customer contact areas. Attend community functions to represent the bank.

The Client Services Manager position has two distinct levels based on previous experience, branch size and staffing levels, and demonstration of management ability in conjunction with the performance of all required duties and responsibilities.

Client Services Manager I is the most senior level position and candidates who meet the requirements to achieve this title will be presumed to hold the lead operations managerial role within the branch they are assigned.

Client Services Manager II is a junior level position and candidates who are placed in this role are presumed to be continuing their training to achieve the level of CSM I, under the direct supervision of the CSM I assigned to the branch.

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, and/or to bend body downward and forward, extending hands and arms in any direction to access files.
- 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.