



JOB DESCRIPTION

POSITION TITLE:	Training Specialist
SUPERVISOR'S TITLE:	VP Corporate Training Manager
DEPARTMENT:	Administration
FLSA STATUS:	Exempt

Position Summary:

The position of Training Specialist is responsible to assist in the designing, coordinating, scheduling, and implementing a variety of corporate training programs including, but not limited to Operations, Lending, Credit, Compliance, Systems, Products and Services, Management, and Supervisory, etc. Administers programs either by personally conducting training sessions or working with subject matter experts to assist them with creation and delivery. Assists with developing and administering mentor programs in specific functional areas. Assists with maintaining comprehensive records for Human Resources, regulatory and audit purposes on the progress and performance of those involved in training. Monitors effectiveness of training sessions. Administers annual corporate compliance training. Travels to other company locations to conduct training as needed.

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

Essential Duties & Responsibilities:

- Identifies training needs, and assists in coordinating development, design and implementation of corporate training programs (including facilitation of training classes in-person, virtually, or recorded training session); makes recommendations to the Training Manager as needed
- Prepares and/or coordinates training materials in conjunction with training programs; recommends appropriate instructional methods; develops teaching aids such as manuals, handbooks and guides; updates materials as needed to ensure they are current and relevant
- Assists Training Manager in ensuring annual Compliance training is completed; produces reports for audits and regulators; assists with administration of the program; works to maintain comprehensive records on other training relative to policies and procedures for use by Human Resources, auditors and regulators
- Provides input on personnel matters as it relates to training and development to include performance appraisals, disciplinary actions, interviewing candidates for employment
- Facilitates training activities including but not limited to the development of training schedules at the request of the Training Manager
- Ability to travel to other locations for business needs and to assist with training needs throughout the Bank's footprint area

Job Related Qualifications

- Computer skills to include use of Microsoft Office products and other computer and/or design programs as required, specifically TechSmith, InDesign, or MS Office software.
- Knowledge and background in using Salesforce CRM, nCino, or other loan workflow-based software.
- Knowledge of training materials encompassing a variety of media including Web based training.
- Skills and demonstrated ability in training techniques to include group and one-on-one training.
- Broad knowledge of training materials, techniques, methods, theories and programs encompassing a variety of delivery channels including web-based training
- Strong analytical skills.
- Excellent oral and written communication skills.
- Outstanding interpersonal skills.
- Effective time management and organizational skills.
- Attention to detail and follow through.
- Ability to interact with coworkers, follow directions and accept constructive feedback.
- Thorough understanding of banking rules and regulations.

Education/ Licenses/ Work Experience

- High school diploma or GED equivalent required.
- Associate's or Bachelor's degree strongly preferred.
- Work related experience should consist of at least two years' experience in the financial services industry, with emphasis in an environment dedicated to training

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, etc.
- Consistent use of a computer and other office machinery is required. 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.