



POSITION DESCRIPTION

Functional Title: Branch Operations Specialist

Effective: October 2013

Reports to: Branch Service Manager (or Branch Manager in stand-alone branches)

Officer Title/Grade: Refer to Leveling Matrix

Direct Reports to this Position: None

Exemption Status Based on FLSA: Exempt () Non-Exempt (X)

Summary of Job Responsibilities:

Maintains awareness, understanding and compliance with Guaranty Bank and Trust's "Code of Ethics", internal policies and procedures, laws and regulations, that are appropriate for his/her position.

Provides technical and functional support to ensure efficient and accurate branch operations.

Essential Duties: *Employees are held accountable for all duties of the job. Individuals must be able to perform these duties with or without reasonable accommodations.*

- 1) Demonstrates core values and guiding principles as outlined in the Bank's identity statement.
- 2) Ensures that all activities and work functions comply with compliance requirements as defined in company policies and procedures and state/federal laws and regulations.
- 3) Performs branch operational duties including; performs or administers daily schedules thus ensuring smooth daily workflow, reviews various reports, guides the branch operations team to ensure the duties of each position are performed according to established guidelines.
- 4) Provides functional guidance to tellers and FSR staff members.
- 5) Complies with bank operations and security procedures; accurately adheres to and supports all dual-control functions, audits and other required certification processes.
- 6) Complies with new account bank policies and procedures, federal and state statutes and regulations.
- 7) Ensures bank fees are collected when appropriate and waived only when necessary.
- 8) Maintains customer privacy and confidence and protects bank documents and operational procedures by keeping information confidential.
- 9) Performs Teller backup support; accurately performs teller paying and receiving functions; vault teller functions; and any other related assignments associated with branch teller operations.
- 10) Participates in the High Performance Checking (HPC) program:
 - o Serves as a team player involved in achieving branch goals.
 - o Recommends the best account to customers by using the sales presentation process and asks for the business.
 - o Uses HPC incentives to attract new customers.
 - o Cross-sells additional products and services using the checking brochure and Welcome Kit as cross-sell tools.
 - o Enthusiastically teaches customers how Tell-A-Friend works.
 - o Ensures completion and follow through on New Customer Welcome form for every new account opened, ensuring thank you notes and follow up calls are completed.
- 11) Participates in and supports activities designed to create deposit and loan growth for the bank.

- 12) May be responsible for generating retail loans by interviewing customers, assessing needs, and processing loans or referring to the most appropriate lending partner within the bank.
- 13) Maintains technical expertise to effectively provide sales and service support:
- 14) Provides exceptional customer service:
 - Service exceeds customers and employees known and unknown needs.
 - Employee Engagement- demonstrates positive/welcoming demeanor.
- 15) Operates with high level of confidence and independence.

Non-Essential Duties:

- Assists various positions within the branch as appropriate.
- Provides technical assistance and training in all areas of the branch.
- Participates in special projects as assigned.
- Performs other duties as assigned.

Required Qualifications [Knowledge (Education), Skills and Abilities (KSAs)]:

- High school diploma or equivalent
- Highly developed communication skills
- Attention to detail and thoroughness.
- Effective follow-up skills.
- Demonstrated leadership abilities.
- Typing and strong computer experience
- Ability to quickly adapt to changing priorities and environments.
- Ability to move between locations as needed.

Preferred Qualifications:

- Some college.
- Performs other duties as assigned.

Types of Decisions: This individual will have the ability to make decisions regarding the opening of new accounts, compliance issues regarding customer accounts, approval of checks and deposits within guidelines, and regulatory matters that would affect a customer's account. Day to day decisions will be made while performing the major duties and responsibilities of the position.

Consequences of Errors: Errors may have a significant adverse effect on relationships with customers, other departments of the bank, or regulatory authorities.

Contact with Others: Unlimited contact with customers and employees both in person and on the telephone. Must display quality of service showing courtesy, tact, and discretion at all times. Maintains a positive demeanor and displays excellence in service, keeping the banks image in mind at all times.

Physical Requirements: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- Ability to lift 50 lbs
- Ability to sit for 4-5 hours due to numerous customer service duties
- Ability to stand for 4-5 hours due to numerous teller related duties

The above statements are intended to describe the general nature and level of work being performed. This job description should not be construed to imply that these requirements (job responsibilities and KSAs) are the exclusive standards of the position. Incumbents may be required to follow other instructions, and to perform other duties, and obtain other KSAs that may be required of the position.

Leveling Matrix

FSLA Code	Operations Specialist 1 Non-Exempt	Operations Specialist 2 Non-Exempt
Required Experience	<ul style="list-style-type: none"> • Minimum of 3 years: teller experience, Financial Service Representative experience or other related experience • Thorough knowledge of assigned functions; strong technical skills • Ability to implement policies and procedures • Demonstrated ability to handles complex customer complaints, helping to resolve escalated issues for team members • Demonstrated ability to prepare and process reports • Demonstrated ability to answer basic questions of less skilled workers or may be “shadowed” by less experienced tellers or FSRs • Leads employees through changes within the Bank serving as a positive role model • Demonstrated mastery of the FSR and Teller roles • Ability to train other employees and new hires • Ability to provide functional guidance and facilitate completion of operational tasks within the branch • Ability to serve as an expert resource throughout the organization to teach and guide individuals in the Teller or FSR role 	<ul style="list-style-type: none"> • Minimum of 5 years: teller experience, Financial Service Representative experience or other related experience • At least one year of prior Operations Specialist experience or equivalent experience. • Demonstrated leadership abilities • Demonstrated ability to handles complex customer complaints, helping to resolve escalated issues for team members • Expert level of knowledge of assigned function; exceptional technical skills • Ability to assist in the development of policies and procedures as well as the subsequent implementation • Assigns tasks; training new hires; answers difficult questions • Demonstrated ability to prepare and processes reports • Leads employees through changes within the Bank serving as a positive role model • Approves “time cards”; schedules teller line and approves time off requests using appropriate judgment • Provides input into performance appraisal process • May conduct Performance Improvement discussions and documentation with Leadership assistance • Participates in the interviewing and hiring process • Ability to serve as an expert resource throughout the organization to teach and guide individuals in the Teller or FSR role

Promotional opportunities within this position are evaluated based on many factors such as performance, supervisor evaluation, demonstrated ability to perform the job requirements of the next level, and other such factors.