

Position: Branch Manager	Date: September 13, 2023
Department: Member Experience	Status: Exempt
Reports To: VP of Member Experience	Shift: Monday – Friday 8:30am-5:00pm
Supervises: 6 – 8	Saturday (rotation) 9:00am – 1:00pm
	Additional hours as needed

At HomeTown Credit Union, we make a difference for our staff, members, and the community by living out our Core Values of Integrity, Commitment, Member Advocacy, Education and Community. We encourage employee engagement in their careers and offer a competitive wage and benefits package.

## Job Responsibilities

Support the development and implementation of initiatives and programs that will strengthen the Credit Union's presence and provide growth opportunities within the community. Provide professional leadership to the branch staff to achieve Credit Union goals and initiatives. Schedule, train, coach, develop and evaluate staff to ensure Credit Union members consistently receive the highest level of service. Provide support and motivation to the branch staff with the objective of building and strengthening member relationships. Responsible for the overall appearance and maintenance of the branch office.

## Essential Job Responsibilities:

- Confidentiality is required.
- Responsible for managing the daily operations including opening and closing the Owatonna South Branch office during the week and on weekends.
- Monitor and approve branch staffing and scheduling to ensure efficient delivery of services.
- Maintain a thorough knowledge of all Credit Union products, services and promotions.
- Maintain a working knowledge of the entire data processing system and a thorough knowledge of the member services and lending platforms.
- Provide support to members regarding products and services in a professional, friendly, enthusiastic, and efficient manner.
- Maintain a thorough knowledge and adhere to all Credit Union policies and procedures.
- Provide backup support to the branch staff for all member services as necessary.
- Ensure that all systems and equipment function such that branch staff and member satisfaction is maximized.
- Maintain a highly motivated, well-trained staff by ensuring staff training and procedures are in place to meet the security needs of the office.
- Oversee and assist in training and education to enhance employee knowledge and skills.
- Provide regular feedback to staff through coaching, performance plans, and appraisals that foster success to achieve goals and objectives.
- Keep management informed of all pertinent issues and maintain on-going office communications.
- Attend seminars, webinars, and round table meetings as a way of keeping current on changes in regulations, industry trends, marketing and business development.
- Assist in establishing individual and branch goals and objectives for the branch staff to align with the vision, mission and to support the strategic direction of the Credit Union and the business plan goals.
- Assist with monitoring office supplies and ensure that all marketing materials are current.
- Communicate professionally both verbally as well as in writing with all members and co-workers.
- Project warmth and competence both in person and over the phone.
- Work in an environment that demands resourcefulness and flexibility and on-the-spot decision making.
- Assist in identifying products, services and promotions that can help to remain competitive in the market.
- Perform other duties as assigned.

## Additional Job Responsibilities:

- Use HomeTown Credit Union's Service Standards as a foundation to demonstrate ongoing commitment to exceptional member service.

- Cooperate with Credit Union staff to ensure a team effort is.
- Maintain regular full-time, punctual attendance to all required shifts, meetings, trainings, and related employment engagements. Any alterations to the required schedule must be reviewed and approved, in advance by senior management.
- Conduct business with the highest standards of personal, professional, and ethical conduct.
- Perform or assist with any operations as required to maintain workflow and to meet schedules.
- Participate in meetings and work groups to integrate activities, communicate issues, obtain approvals, resolve problems, and maintain specified level of knowledge pertaining to new developments, requirements, policies, and regulatory guidelines.
- Ensure the Credit Union brand is always promoted in a consistent and professional manner.
- Ensure all safety precautions are followed while performing the work.
- Ensure the branch office always has a professional and organized appearance.

### **Education, Knowledge, Skills, and Experience:**

- Associate degree or equivalent from a two-year college or technical school in a business-related field.
- Minimum of two years' experience in a financial institution with lending experience preferred.
- A minimum of two years' experience in a leadership role preferred.
- Proven ability to effectively use marketing strategies and sales techniques to promote financial products and services.
- Demonstrated ability to get along with and work with people in high pressure and stressful situations while maintaining business-like composure.
- Ability to work as a member of a team in daily operation of the Credit Union.
- Detail orientated with the ability to multi-task, prioritize activities and manage change.
- Self-motivated.
- Excellent communication skills, including listening, writing and presentation.
- Excellent decision-making skills.
- Proficient in Microsoft Office (Outlook, Word, Excel etc.)

### **Tools & Equipment Used**

- Computer, copier, printer, scanner, fax, postage machine, etc.

### **Physical Requirements / Working Environment**

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.

- Sitting or standing at a workstation for extended periods of time (4, 6 or 8 hours)
- Working on a computer throughout the day (monitor, keyboard, and mouse use)
- Ability to listen and focus for long periods of time.
- Standing at a copier for extended periods of time.
- Ability to lift up to 30 lbs.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Hours over and above normal office hours could occur, including evenings, holidays, and some weekends. Schedule is subject to change based on business needs.

### **Disclaimer**

*The above information in this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job. This is not an all-inclusive position description; therefore, management has the right to assign or reassign schedules, duties, and responsibilities to this job at any time.*