

JOB DESCRIPTION

Business Area: Deposit Management

Functional Title: Client Service Representative – San Francisco Office

Position Summary:

The Client Service Representative position requires a high level of client interaction in providing exceptional sales and service. Client Service Representative will identify cross-sell opportunities and make appropriate referrals. Provide assistance to Office Manager for operational and compliance tasks in the day to day operations of the office.

Roles and Responsibilities:

Sales & Service

- Promote service excellence by modeling exceptional client service characteristics to retain and build existing relationships with clients.
- Meet and exceed sales and service goals and objectives.
- Respond to difficult or complex product and service inquiries from clients, team members and business partners.
- Build internal and external relationships through exceptional problem solving, ownership and follow-through.
- Model exemplary client service behaviors.

Internal Operations

- Ensure compliance with all Federal, State and local laws as well as BPB&TC policies and procedures.
- Ensure accurate and timely processing of platform transactions.
- Assist in all office operations with platform and teller processing.
- Oversee all operations procedures pertaining to the ATM
- Other duties as required.

Qualifications:

- Degree preferred, not required
- 2-3 years experience in retail banking
- Superior client service skills
- Cross Selling Skills
- Strong communication skills – oral and written

- Organization Skills
- Systems & Technical Knowledge including Microsoft Word, Excel, PowerPoint and Access