

OPPORTUNITY BANK OF MONTANA

JOB DESCRIPTION

Job Title: Relationship Banker I

Position Summary: Responsible for offering and recommending appropriate personal and business financial products and services to customers. Provide service functions, including teller functions, while promoting an exceptional customer experience. Build and sustain relationships with consumer and business contacts.

Core Competencies

Demonstrated ability:

- To maintain confidentiality
- To provide excellent customer service
- To handle stress and meet deadlines/goals
- To work independently and as a team member
- To perform basic math functions
- In attention to detail and accuracy
- In computer use including Microsoft Office Suite
- In oral communication and interpersonal skills
- In judgment and decision-making
- In analytical and problem-solving skills
- In time management

Physical Requirements

Ability to:

- stand for extended periods of time
- use telephone frequently
- extensive use of computer screen
- normal or correctable to normal vision and hearing
- reach, stand and walk on frequent basis
- lift and carry up to 20 pounds on occasional basis
- kneel, crouch and climb on occasional basis

(Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions)

Environmental Demands

Exposed to potential hazard of robbery – position receives detailed instructions to minimize risk

Education and Experience Requirements

High school diploma or equivalent

Education and Experience Preferences

2 years relevant experience
Cash-handling experience
Leadership experience
1 year sales experience
Familiarity with deposit accounts

Licensing/Certification Requirements

Other Requirements

FLSA Status

- Eligible for overtime pay
- Exempt from overtime compensation

Supervisory Responsibilities

As outlined in Essential Functions & Key Areas of Responsibility

Classification Level

Wage Band B

Work Hours

Typical schedule may be varied and flexible Monday-Friday between 7:30 a.m. – 6:30 p.m. with flexible hours as needed during peak times, vacations, and sick leave. Some job positions regularly work Saturday shifts and supervisor will advise if applicable to this job position.

Employee may also be required to work extended hours on an occasional basis in order to fulfill job duties and responsibilities as outlined in Essential Functions & Key Areas of Responsibility.

Essential Functions & Key Areas of Responsibility

- Develop customer relationships through active profiling and needs-based questioning to identify deposit, credit, investment and other needs.
- Responsible for opening new personal and business deposit accounts, identifying and selling appropriate consumer loan solutions, responding to customer inquiries, resolving issues, and recognizing and referring cross sale opportunities
- Adhere to all operational and security policies and procedures, including enforcing compliance and privacy policies maintained by the bank
- Establish, retain and deepen relationships with existing and new customers in the community to achieve branch sales goals and provide exceptional customer service
- Perform all teller functions and have a cash drawer as necessary, maintaining proper cash and authority limits while balancing as required
- Demonstrate the ability to prospect and plan selling strategy internally and externally. Use sales and business development skills necessary to develop and actively participate in a calling program.
- Perform other related duties as assigned.

Disclaimer: The information portrayed on this job 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 the employees assigned to this job.

Employee Signature _____ **Date** _____