

**Job Title:** **Branch Manager I**

**Department:** Advocacy  **Grade:** 10

**Reports to:** VP of Branch Administration **Exemption Status:** Exempt

**Supervisory:** Yes **Date:** 5/1/2022

**Job Description:**

A Branch Manager I must provide outstanding service to all members and identify and find solutions for their financial needs in order to better their financial lives’. The person in this role is responsible for branch growth, improved profitability and member relationships through business development within the branch community and through consistent coaching and training of branch staff. Branch Manager I supervises a maximum of five full time employees (directly or indirectly within their branch) typically in a lower volume branch as defined by net income or an ITM branch (branch without a traditional teller line).

Connex has a right to transfer you to other locations to perform the same or other duties, if Connex believes such a transfer is in its best interest. This transfer may be temporary or permanent and you will be notified in advance if that is to occur, except for temporary, emergent transfers to cover due to shortage or other problem.

**Essential Functions and Responsibilities:** includes the following, and other duties may be assigned.

Advocacy:

1. Delivers and ensures branch staff delivers high quality service to members as defined by our Advocacy Promises.
2. Coaches & Leads all Branch personnel:

* Coaches sales and service skills to all branch team members. Works with other branch leaders to ensure sales & service coaching occurs regularly;
* Develops sales & service leadership skills in Service Coordinators & Assistant Branch Managers;
* Works on employee development including guidance of each person in the branches, career planning, and taking the appropriate steps with action plans when disciplinary action is needed. Has the authority to terminate any Branch personnel, according to personnel policies.
* Drives quality hiring for all branch positions.

1. Assists the VP of Branch Administration in development of goals, analyzing results, making adjustments when goals are not met and celebrating when they are. Drives this process with Service Coordinators & Assistant Branch Managers.
2. Ensures that the branch meets and exceeds its goals.
3. Assigns, coordinates, and monitors workflow and productivity to ensure high levels of accuracy, quality and quantity are maintained.
4. Drives branch reporting by working with Service Coordinators and/or Assistant Branch Managers to compile individual branch results and combining results to measure the branch’s productivity.
5. Oversees the daily operation of the Branch, according to written Branch operations standards, including adherence to security procedures;
6. Resolves member problems/responds to inquiries beyond the authority of other Branch personnel.
7. Advises VP of Customer Branch Administration on training needs and/or production problems.
8. Ensures that the branches maintain and utilize all Marketing provided.
9. Assists in maintaining adequate Member Service Staff through:

* Training support
* Filling vacancies promptly

1. Ensures that all branch staff complies with federal laws, regulations and internal controls as well as all credit union policies and procedures and supports the sales & service culture of the organization.
2. Maintains knowledge of competitors’ rates and terms and other trends related to the credit union industry and drives that knowledge with the branch team.
3. Makes recommendations to the VP of Branch Administration for changes and improvements in procedures concerning the branch in relation to overall operations.
4. Ensures successful project management.
5. Drives the connectivity & cohesiveness of all branches with the main office and ensures that the quality culture of the organization exists at the branch.

Business Development

1. Builds and maintains relationships with SEG groups and local businesses within the branch community to grow the business.
2. Maintains a regular schedule for business development.
3. Participates in the community to help grow awareness and brand recognition of the credit union.

Lending:

1. Interviews loan applicants, analyzes credit and financial information and makes decisions on loans within prescribed limitations;
2. Accurately completes required loan forms and related documents necessary in the lending process;
3. Assures quality control of loan check disbursements by:

* Verifying payment date
* Assuring amount of check agrees with loan amount
* Assuring proper signatures and required documentation is retained

1. Pre-qualifies prospective mortgage and home equity candidates and co-ordinates 1st mortgage interviews with mortgage originator
2. Keeps abreast of all changes in Lending procedures and policies.

**Performance Measurements (if applicable):**

**Qualifications and Requirements:**

* Proven commitment to providing quality service to members in current position illustrated by past record of exemplary member interaction;
* Ability to successfully lead a large branch and staffing compliment;
* Minimum 3 years retail sales management or branch experience and heavy retail and commercial customer contact environment;
* 3+ years interviewing experience in consumer loans and related insurances;
* Bachelor’s Degree or equivalent educational or a minimum of 3 years of related work experience;
* Minimum 3 years of direct supervisory experience;
* Primary focus on building a strong sales team and growing membership
* Expectation is 20-30% of time is focused on external networking, community involvement, and SEGs
* Strong sales oriented customer service skills and a thorough knowledge of Credit Union systems, (retail and operations) with experience in accounting, researching records and loan processing desirable;
* Knowledge of federal and state laws and regulations governing consumer banking;
* NMLS
* Notary public
* Ability to manage multiple tasks simultaneously;
* Excellent interpersonal skills;
* Ability to effectively communicate in writing and orally;
* Ability to analyze member problems and find beneficial solutions in a timely manner;
* Continued education through selected training courses
* After hours meetings required
* Windows, Microsoft Word & Excel skills
* Provides coverage to other branches as needed
* 40 + hours per week, some Saturdays