



POSITION DESCRIPTION

TITLE:	BrightOak Partner/Customer Support Representative	CATEGORY:	Full-Time
FLSA:	Non-Exempt	LOCATION:	Battlefield
SEGMENT:	BrightOak	REPORTS TO:	VP, Operations Support
SHIFT:	Tuesday-Friday: 11:00 a.m.-8:00 p.m. Saturdays: 9:00 a.m.-5:00 p.m.	DATE:	February 16, 2023

SUMMARY

The position of the Partner/Customer Support Representative will be responsible for maintaining support by working with our partners when they are in need of assistance. This position will maintain a steady work flow by reviewing all system data added by our partners. The team environment is built around fostering long-term relationships with the right partners. Our culture is driven and ambitious, and you will be well supported in a highly collaborative and interactive environment.

Assures compliance with all Bank policies and procedures, as well as all applicable state and federal banking regulations.

BRIGHTOAK

We have a passion to SERVE.

BrightOak was born out of a community bank that saw value in offering products specifically tailored to consumers seeking financing sources for renewable energy purchases. Through our banks own journey into a move to being better stewards of the environment, we discovered that there is also a significant financial incentive to investing in renewable energy. Through our own acquisition of solar for multiple locations, we began to become more educated on why this product makes sense for our customers. From that experience, we decided to invest in the development of an entirely new endeavor within our organization and even within the broader industry. With the backdrop of being a community bank, we knew that what we were trying to accomplish required a great deal of innovation. To achieve this, a team of industry veterans was assembled and tasked with creating products and programs that are user friendly for our contractor partners and desirable for consumers, all while having a positive impact on the community and our environment. BrightOak's financing solutions make the purchase of a residential solar energy system affordable to homeowners across the country. BrightOak has a strong technology orientation and has developed a lending platform to efficiently deliver our financing products. BrightOak is a very fast-growing company that is revolutionizing residential solar through an innovative lending model leading to a very exciting work environment for all team members.

ESSENTIAL DUTIES

- Cultivate and develop new and current relationships with business owners and sales representatives for adoption and use of BrightOak products.
- Create and strengthen long term relationships via phone, webinars, and in person training.
- Monitoring contracts and partners.
 - **Examples Include:**
 - When a loan or lease is to the the verification, review partners contract to verify all information is inputted correctly and matches the system.
 - When a partner is in home and needs assistance with application, monitor application and assist partner through the process to get the application launched.

- Dual verification is required all on steps, process files as first verification and then pass to a team member for a dual step process.
- Identify how to successfully use the County website to research tax and lien history.
- Provide effective partner support and customer support
- Identify new opportunities that will contribute to unprecedented growth.
- Develop training specific to individual accounts.
- Treats people with respect, keeps commitments, Inspires the trust of others, works ethically and with integrity, upholds organizational values, and accepts responsibility for own actions.
- Demonstrates knowledge of and adherence to EEO policy, shows respect and sensitivity for cultural differences, educates others on the value of diversity, promotes working environment free of harassment of any type, and builds a diverse workforce and supports affirmative action.
- Follows policies and procedures, completes administrative tasks correctly and on time, supports the Bank's goals and values, and benefits the Bank through outside activities.
- Performs the position safely, without endangering the health or safety to themselves or others and will be expected to report potentially unsafe conditions. The employee shall comply with occupational safety and health standards and all rules, regulations and orders issued pursuant to the OSHA Act of 1970, which are applicable to one's own actions and conduct.

SECONDARY DUTIES

The position of Partner/Customer Support Representative performs duties specific to the position and other functions as assigned.

SUPERVISOR RESPONSIBILITY

The position of Partner/Customer Support Representative is not responsible for the supervision of any employee(s).

ENVIRONMENT AND PHYSICAL ACTIVITY

The incumbent is in a non-confined office-type setting in which he or she is free to move about at will. It may include some minor annoyances such as noise, odors, drafts, etc.

The incumbent in the course of performing this position spends time writing, typing, speaking, listening, lifting (up to 10-20 pounds), driving, carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.

The incumbent for this position may operate any or all of the following: telephone, cellular telephone, beeper, copy and fax machines, adding machine (calculator), check protector, microfilm equipment, encoder, money counter, credit card terminal, typewriter, computer terminal, personal computer and related printers.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. 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 accommodations may be made to enable individuals with disabilities to perform the essential functions.

MENTAL DEMANDS

The incumbent in this position must be able to accommodate to reading documents or instruments, detailed work, problem solving, customer contact, reasoning, math, language, presentations, verbal and written communication, analytical reasoning, stress, multiple concurrent tasks, and constant interruptions.

MINIMUM REQUIREMENTS

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- High school diploma or general education degree (GED) and **1+** years of related experience and/or training, or the equivalent combination of education and experience. Solar experience is not required but is recommended.
- Business to Business relationship experience is recommended.
- Ability to influence and connect with customers.
- Excellent verbal communication skills. Bilingual is preferred, but is not required.
- Strong relationship building skills.
- Ability to communicate with executives and business owners.
- Assist in resolving problems within given authority.
- Share a willingness to learn and grow in a fast-paced, changing start-up environment.
- Highly organized and process-oriented.
- Enjoys being a team player by supporting other operational functions and team members.
- Ability to work with general supervision while performing duties.
- Current **STATE** driver's license and a vehicle with appropriate insurance coverage if required to drive while performing assigned duties and responsibilities.

Management reserves the right to change this position description at any time according to business needs.

