

OAKSTAR BANK

POSITION DESCRIPTION

TITLE:	Consumer Experience Team Lead	CATEGORY:	Full Time
FLSA:	Non-Exempt	LOCATION:	GSD Center
SEGMENT:	Retail	REPORTS TO:	Consumer Experience Supervisor
SHIFT:	Flexible, but Saturday's required	DATE:	9/20/2021

SUMMARY

The Team Lead will be responsible for weekend support and will be acting as a manager-on-duty for Saturday's. The Team Lead will still be responsible for answering calls, handling live chats, and all other tasks of a Consumer Experience Specialist, but with the added responsibility of being an additional resource for agents during their shift.

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

ESSENTIAL DUTIES

1. Treats people with respect; keeps commitments; Inspires the trust of others; works ethically and with integrity; upholds organizational values; accepts responsibility for own actions.
 2. 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; builds a diverse workforce and supports affirmative action.
 3. Follows policies and procedures; completes administrative tasks correctly and on time; supports the Bank's goals and values; benefits the bank through outside activities.
 4. 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.
 5. Handles escalated calls and events on Saturday's.
 6. Available as a resource for agents.
 7. Produce weekly reports for the Experience Center management on all relevant information on issues regarding telecom, software, agent, and any other areas of interaction.
 8. Provides quality assurance to management and customers by helping agents with any issues, and escalating when appropriate while still taking calls as able, making sure there are adequate resources to handle call and chat volume.
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SECONDARY DUTIES

The position of Consumer Experience Team Lead performs duties specific to the position and other functions as assigned.

SUPERVISORY RESPONSIBILITY

The position of Consumer Experience Team Lead is not directly responsible for the supervision of any employee(s), however the Team Lead will work closely with management to identify and address any needs in a supervisory capacity.

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. The position includes driving a Bank or personal owned vehicle approximately **1%** of the time which includes exposure to the outside weather elements and moving mechanical parts. 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 **30** 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); or **1+** year of related experience and/or training; or the equivalent combination of education and experience. Work related experience should consist of a cash handling and/or customer service background. Educational experience, through in-house training sessions, formal school or financial industry related curriculum, should be business or financial industry related.
- 1+ year of banking call center experience
- Basic experience, knowledge and training in branch operation activities, terminology and products and services.
- Basic knowledge of related state and federal banking compliance regulations, and other Bank operational policies.
- Basic skills in computer terminal and personal computer operation; mainframe computer system; word processing and spreadsheet software.
- Basic math skills; calculate interest and balance accounts; add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals; locate routine mathematical errors; count currency, coin and negotiable instruments in a timely manner.
- Effective oral, written and interpersonal communication skills with the ability to apply common sense to carry out instructions, interpret documents, understand procedures, write reports and correspondence, and speak clearly to customers and employees.
- Ability to deal with routine problems involving multiple facets and variables in standardized situations.
- Good organizational and time management skills.
- 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 in the course of performing assigned duties and responsibilities.
- Leadership experience preferred, but not necessary

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