



# ADAMS BANK & TRUST

## JOB DESCRIPTION

**JOB TITLE:** Region Retail Services Coordinator  
**DEPARTMENT:** Retail  
**REPORTS TO:** Retail/Marketing Manager  
**SUPERVISES:** Tellers, FSR's and Personal Bankers  
**FSLA Status:** Exempt

**POSITION SUMMARY:** Directs and oversees all Retail service delivery and daily operations of a region location. Develops a cohesive Retail team that works together among and between locations within the region to ensure smooth and efficient delivery of Retail products and services, aligned with the Bank's strategic plan and core values. Ensures all bank and regulatory policies and procedures are followed. Ensures all customers receive prompt and courteous service and that products and services offered meet the needs of the bank's customer base. Travels between region locations, as necessary.

### PRIMARY ACCOUNTABILITIES AND RESPONSIBILITIES: (95%)

- (30%) 1. Drives all aspects of the retail Sales & Service process for a specified region. Develops daily and weekly region sales plans, in conjunction with location managers. Sets goals with the staff and ensures accountability for their sales and referral performance. Plans and facilitates region retail sales meetings to discuss sales and referral results, product promotions, etc. Ensures that assigned sales goals are achieved. Monitors weekly tracking of branch sales programs.
- (30%) 2. Develops a cohesive regional staffing team within the region. Shares and coordinates staff among and between locations. Coaches and develops direct report employees, including assistance with short and long term career planning and employee retention. Sets goals with staff and coaches/evaluates employee performance. Ensures that the culture of the location is characterized by teamwork, high morale and retention of valued employees. Assures effective bankwide communication.
- (15%) 3. With the location managers, is responsible for ensuring retention of profitable customers at the various locations. Develops and implements teleservicing plans to include calling on maturing accounts, sales leads, referrals, new account follow-up, and other prospecting opportunities for the designated market area. Proactively identifies sales opportunities with an emphasis on establishing profitable client relationships. Tracks results and follow up as appropriate.
- (10%) 4. Is a working manager. Promotes, explains, and sells all retail banking products. Asks clients for referrals. Maintains a portfolio of existing retail customers. Does consumer lending
- (5%) 5. Authorizes transactions in accordance with bank policy (e.g., deposits, withdrawals, check cashing, wire transfers, etc.). Addresses and resolves client concerns and inquiries. Ensures and is held accountable for the audit integrity, risk management, and security of the branch.
- (5%) 6. Maintains thorough product knowledge of all retail products. Provides staff training to include product knowledge, sales, referrals, customer service, and policy and procedures.

**SECONDARY DUTIES AND RESPONSIBILITIES: (5%)**

1. Other duties as may be assigned.

*The statements contained in this job description describe the general nature and level of work being performed by the person accepting this role. "Secondary Duties and Responsibilities" are considered incidental or secondary to the overall purpose of the job. This job description does not state or imply the only duties and responsibilities assigned to this job. Employees holding this job will be required to perform any other job-related duties requested by management. All job requirements are subject to possible modification to reasonably accommodate individuals with a disability.*

**MANAGEMENT SPECIFIC:**

1. Ensures that sales employees have clear goals and responsibilities consistent with bank culture and core values.
2. Supports the ongoing implementation of the Performance Management system, utilizing tools and attending training sessions.
3. Works with direct reports to set performance standards that are specific and measurable.
4. Supports, coaches and mentors sales teams.
5. Provides specific performance feedback, positive and corrective, as soon as possible after the event and formally at least once a year. Deals firmly and promptly with performance problems.

**TEAM/COMMITTEE ASSIGNMENTS:**

- Retail Committee
- Operations Committee

**ROLE QUALIFICATIONS:****Education**

- Bachelor's degree (B.A.) from four-year college or university plus additional bank-related training.

**Experience**

- 4-5 years related experience and/or training
- Proven management experience, minimum of 3-4 years
- Or equivalent combination of education and experience

**Other Skills/Characteristics**

- Proficient computer skills
- Excellent communication skills, both written and verbal
- Effective problem solving and decision making skills
- Ability to multi-task
- Proven management skills
- Ability to deal with customers and staff under circumstances requiring tact, diplomacy and confidentiality
- Sales management and business development skills

**Performance Measures**

- Manages branch/region personnel with limited turnover
- Grows average customer wallet share a minimum of \_\_\_\_\_ annually (TBD)
- May maintain and grow a consumer loan portfolio
- Grows region deposits a minimum of 2 MM net per year
- Grows fee income for region a minimum of 10% annually
- L.E.T reverse evaluation score of 5.5 minimum annually

By signing below, I acknowledge I have read and understand the Job Description above.

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_