

TITLE 5: Job Descriptions

DATE APPROVED: 8/2025

Printed Employee Name

Date

Employee Signature

TITLE: Branch Manager I

REPORTS TO: VP of Member Services

Position Summary:

Responsible for supervising the daily operations of the Frontline. This role will be responsible for assisting Member Service Representatives in the areas of account transactions, Member service, problem resolution, and product/service information. This position will uncover needs and deliver solutions to advance our Members' financial success. This position will cross-sell products and services, open all deposit accounts, including specialty and business accounts to deepen member relationships through quality follow-through. Ensures that consistent quality member service practices and high-level Member service expectations are met. Ensures that operating policies, practices, and procedures adhere to regulatory requirements. This position will assist with loan applications as needed with a limited lending authority.

Essential Functions:

- Uncover needs and deliver solutions by cross-selling products and services to deepen Member relationships through quality follow-up and follow-through.
- Assists Member Service representatives by answering questions about products and services and resolves problems within his/her authority to resolve, referring issues beyond his/her authority to the VP of Member Services.
- Identifies and takes action to improve the department's operating methods and procedures.
- Identifies cross-sell opportunities to Member Service Representatives and assists with cross-sell services to Credit Union Members.
- Directs, develops, motivates, schedules, trains, and monitors those on the Frontline. Works with Senior Management to establish goals and action plans. Establish performance improvement plans and disciplinary actions. Participates in hiring and firing decisions and recommends promotions. Approves time records and time-off requests.
- Motivates, coaches, and mentors' staff. Resolves employee conflicts, identifies problems, and gives input to management on problem resolution. Acts as a mediator between staff and management personnel.
- Serves as backup to Member Service Representatives as needed.
- Performs other job-related duties as assigned.

TITLE 5: Job Descriptions

DATE APPROVED: 8/2025

Performance Measurements

- Maintain a cohesive, highly trained, motivated frontline sufficient to meet daily demands and Member needs.
- Ensure all activities within the department are carried out within prescribed time frames and with zero unresolved errors.
- Develop and improve the knowledge and skills of assigned Member Service Specialists and Representatives.
- Provide informed, prompt, accurate service and support to all Members and associates by waiting on members in lobby, answering the phone and responding to messages or correspondence.
- Troubleshoot and resolve Member and internal inquiries in a timely and accurate manner.
- Note observations of employee performance and perform on-the spot coaching. Give and receive feedback from Member Service Specialists and Representatives.

Minimum Qualifications:

- Bachelor's degree or equivalent working experience
- 5+ years Management Experience, Credit Union/Banking Experience Preferred

Skills:

- A significant level of trust and diplomacy is required, in addition to normal courtesy and tact.
- Work involves personal contact with others and/or is usually of a personal or sensitive nature.
- Work may involve motivating or influencing others.
- Outside contacts become important and fostering sound relationships with other entities becomes necessary.
- Must have excellent oral and written communication skills.
- Must be able to operate general office equipment

Supervisory Responsibilities:

- Yes

Working Conditions:

- Branch-based. Work conditions include standing, lifting, bending, stooping, and reaching.

Printed Employee Name

Date