

Job Description

Title	Branch Manager	Salary Grade	Non-Exempt
Department	Branch Operations	Effective Date	April 15, 2023
Reports To	COO	*Remote Devices	Yes (list below): <input type="checkbox"/> No: <input type="checkbox"/>

Devices: Laptop/Computer ☐ Desk Phone ☐ Cell Phone ☐ Printer/Scanner ☐ Other ☐ _____

**If devices are required and/or approved, a separate Remote Work policy must be signed by the employee.*

RESPONSIBILITIES

OVERVIEW: Responsible for management and oversight of the branch, including sales and service, operations and leadership of the staff. Provides leadership and development for branch leaders and staff to meet / exceed goals and objectives while providing consistent and excellent member experience.

JOB RESPONSIBILITIES:

- Ensure excellent member service, every member, every transaction, every time.
- Hire, assess, coach and develop high performing branch teams to ensure consistency and uniformity in providing excellent member service, achieving sales goals, and ensuring an operationally and regulatory compliant branch at each given location.
- Create and ensure an ongoing sales through service culture. Ensure branch staff possess and utilize sales, service, and cross-sell skills to achieve individual and team sales goals.
- Assist in the creation, implementation, and achievement of the branch business plan and branch objectives. Implement appropriate strategies to meet sales and service goals while maintaining a safe operation in each location.
- Implement and monitor sales and cross-selling programs to continue to improve products per member while ensuring members are advised of the best products and services to best fit their financial needs.
- Ensure top-notch member service standards are being met within the branch; oversee branch scheduling to ensure proper resources are allocated to functions necessary to ensure an effective and efficient flow of member traffic.
- Ensure operations within the branch are consistently applied within policy/procedure as well as rules and regulations; maintain a clean, safe operation within the branch.
- Conduct required in-branch audits weekly and monthly to ensure compliance with policies/procedures and rules and regulations. Respond timely to audits with effective action plans to ensure ongoing safety and soundness.
- Ensure dual control is implemented and always followed; manage overall cash position for the branch while limiting excess cash and overall expense.



**SHELBY COUNTY
FEDERAL CREDIT UNION**

- Comply with BSA and SAR requirements and ensure branch staff do the same.
- Ensure proper disclosures, marketing materials, etc. are readily available for staff to utilize.
- Review and analyze branch reports and activities, including income generation, production goals and results, expense items, audits, etc. to successfully meet / exceed branch requirements, goals and objectives. Utilize tools and reports to analyze, identify and strategically address member trends within the branch.
- Actively spend quality time within your branch for ongoing coaching and development of branch staff; drive sales and service activities such as branch sales strategy meetings, business development and community events, ongoing branch meetings, etc.
- Manage and oversee staffing and administrative functions of your branch including succession plans, career plans, performance reviews, coaching and counseling documentation, promotions, and all human resources decisions for the branch. Ensure timely execution of all required documentation.
- Recommend changes to management to help improve the overall branch operation and member service.
- Other duties as assigned.

EDUCATION

- High school graduate or GED required.
- Associates and/or Bachelor's degree in business or a relative field is strongly preferred.
- Minimum 5 years' experience in a retail leadership role
- Minimum 3-5 years' experience branch banking required.

REQUIREMENTS

- Proven results in leadership, development, hiring and managing multiple teams.
- Proven results in sales, service and operations including meeting or exceeding set objectives.
- Excellent verbal and written communication skills
- Ability to work and interact well in an optimistic manner with other key leaders in the credit union.
- Highly ethical.

Shelby County Federal Credit Union (SCFCU) is an Equal Opportunity Employer.

SCFCU provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

Please submit your internal posting to LPoley@shelbycountycu.com.