JOB DESCRIPTION

POSITION: Service Manager
REPORTS TO: Branch Manager
SUPERVISES: Refer to company intranet

COLUMBIA CREDIT UNION'S LEADERSHIP PHILOSOPHY

Leaders at Columbia CU inspire enthusiasm and accountability that drive our mission. Leaders build engagement and communicate honestly and openly. By rallying everyone around our shared vision, Leaders model and expect the best from individuals and teams.

JOB SUMMARY

The Service Manager carries out administrative and accounting duties within the branch by organizing and coordinating banking services. This position works closely with the VP Branch Manager to develop and maintain a cohesive team that meets or exceeds the credit union's expectations for member service, sales, and all aspects of branch operations. The Branch Operations Supervisor is responsible for overseeing the efficient operation of the branch, with a strong focus on member service, staff development, and compliance. This role requires exercising professional judgment in making decisions that benefit both staff and membership.

ORGANIZATIONAL COMPETENCIES

- **Instills Trust**
  Gaining the confidence and trust of others through honesty, integrity, and authenticity.

JOB SPECIFIC COMPETENCIES

- **Action Oriented**
  Taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm.
- **Being Resilient**
  Rebounding from setbacks and adversity when facing difficult situations.
- **Builds Effective Teams**
  Building strong-identity teams that apply their diverse skills and perspectives to achieve common goals.
- **Collaborates**
  Building partnerships and working collaboratively with others to meet shared objectives.
- **Communicates Effectively**
  Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences.
- **Customer Focus**
  Building strong customer relationships and delivering customer-centric solutions.
- **Directs Work**
  Providing direction, delegating, and removing obstacles to get work done.
- **Drives Engagement**
  Creating a climate where people are motivated to do their best to help the organization achieve its objectives.

- **Manages Ambiguity**
  Operating effectively, even when things are not certain or the way forward is not clear.

ESSENTIAL DUTIES

- Delegate duties and specific tasks to qualified team members to meet branch and credit union goals and objectives.
- Directly supervise staff, including scheduling, training on products, services, policies, procedures, rules, and regulations.
- Ensure transaction accuracy, offering solutions to serve members' financial needs, and building strong member relationships.
- Assist with the branch's administrative functions, such as processing member transactions and requests, maintaining ATM and coin machine operations, and managing vault activities.
- Support operational soundness by sharing audit efficiencies, successes, and opportunities with the team.
- Ensure branch operations are in full compliance with internal audit requirements and applicable state and federal regulations.
- Lead annual compliance audits and ensure sound results.
- Maintain and enforce branch security at all levels, including opening/closing the facility, managing vault and safe deposit, and ensuring staff training on security and robbery procedures.
- Attend required operational meetings and participate in cross-functional projects, promotions, and community events.
- Ensure MSA team is engaged, informed and aligned with the goals of the organization.
- Regularly assess and monitor performances and activities of branch staff by evaluating transaction reports, balancing reports, and member feedback.
- Act as a back-up to the Branch Manager, performing all branch management duties as required.
- Act as a sponsor, supporting new associate learning and onboarding in their home/training branch.
- Actively assist the Branch Manager in the sustained growth of the branch by introducing appropriate product solutions and services and helping to facilitate their implementation.
- Set up workflow processes to ensure service and compliance for all banking operations.
- Exhibit strong decision-making skills in handling all financial issues encountered within the branch.
- Compose and conduct monthly and quarterly coaching sessions for MSA staff and provide ongoing feedback to the Branch Manager regarding staff performance.
- Reflect progressive responsibility, leadership, and expertise in managing branch operations, development of staff and achieving financial goals.
- Motivate and mentor staff to deliver outstanding member service, demonstrating Branch Service Standards on a daily basis.

JOB REQUIREMENTS

Required Industry Experience:

- Service Manager I
  - Minimum three (3) years of financial industry experience.
  - Proficient with complex new accounts to include small business and fiduciary accounts.
  - A thorough understanding of unsecured loan products, titled loans, credit cards and Home Equity loan products.
- Service Manager II
  - Minimum three (3) years of financial industry experience.
  - Minimum two (2) years of leadership experience.
- Service Manager III
  - Minimum five (5) years of financial industry experience.
  - Minimum five (5) years of leadership experience.

AND

- A bachelor's degree in business administration is preferred.
- Ability to lead branch operations and act as a branch PIC (Person in Charge) in the absence of Branch Manager.
- Ability to learn and become proficient with DNA Teller Software, Loans PQ, and other applicable software programs.
- Ability to open complex accounts and process loan applications in a timely manner.
- Advanced understanding of federal and state regulations as they apply to member accounts.
- Demonstrated professionalism in both written and verbal communication skills.
- Demonstrated proficiency in Word, Excel, Microsoft Outlook and Teams.
- Demonstrates sound decision-making skills and flexibility in scheduling.
- Excellent communication skills in a professional, outgoing, and positive manner.
- Highly organized with the ability to handle multiple tasks and supervise the work of others efficiently.
- Must obtain a notary designation within the year.
- Proficiency in all teller functions and a basic understanding of FSR duties.
- Proven ability to meet and exceed assigned goals.
- Reliable to work scheduled shifts: Monday through Friday and Saturdays to include a split week schedule, as needed. Must be available to attend branch meetings when scheduled.
- Required current NMLS license or the ability to obtain upon hire (NMLS Mortgage Loan Officer Registration required).
- Thorough knowledge of credit union products, services, and delivery channels.

PHYSICAL REQUIREMENTS

The physical requirements outlined below encompass the diverse range of abilities needed for individuals to effectively perform the essential functions of this job.

- Communicate information and ideas clearly for mutual understanding.
- Exchange accurate information effectively in various situations.
- Observe details at close range (within a few feet of the observer).
- **Frequently** remain in a stationary position.
- **Occasionally** move around the workspace.
- **Constantly** operate a computer and other office productivity machinery.
- **Rarely** ascend/descend a ladder.
- **Occasionally** position oneself to maintain files or other items.
- **Rarely** move items weighing up to 60 pounds across the office for various needs.
- **Occasionally** work in outdoor weather conditions.
- **Never** operate a vehicle.
- **Occasionally** travel between worksites.