

New Accounts Representative - Job Standards

Job Standards include: (Note: this is a representative list only - complete list provided with purchase)

KNOWLEDGE OF WORK:

- Knows how to properly record all teller, end of day, and balancing transactions
- Maintains working knowledge of policies and procedures directly related to duties and responsibilities, including all procedures and processes related to new accounts
- Maintains authorized vault/cash drawer (min/max) levels established by supervisor
- Understands all organization products and services and maintains a current knowledge of all changes in processes, regulation, or policy changes
- Knows how to correctly complete all forms and set up new accounts in organization's database system

QUALITY OF WORK:

- Completes transactions, end of day processes, audits, and general ledger reconciliation's in timely manner; maintains 100% accuracy in cash drawer balancing
- Conforms to all teller related policies/procedures without exception
- Maintains a professional relationship with customers/staff at all times, in all matters
- Manages time wisely, prioritizes tasks, and communicates effectively with employees and co-workers
- Work performed results in high levels of customer satisfaction

QUANTITY OF WORK:

- Organizes work to accommodate handling between ___ and ___ new account transactions daily
- Completes monthly reporting/audit requirements within third working day of following month
- Handles customers' requests in a timely manner; processes a minimum of ___ new account transactions monthly
- Meets goals and deadlines established by the department supervisor
- Processes transactions effectively and efficiently resulting in error free work

ORAL COMMUNICATION:

- Excellent communicator. Good listener, is empathetic without being sympathetic. Uses clear, concise message content, resulting in effective communication
- Uses proper language at all times, including correct banking terminology for accounts, policies, charges and fees, and conditions of account operations
- Considers feeling of others; seeks to reconcile views and clarify misunderstandings
- Uses neutral language, when appropriate, to encourage more input from others

WRITTEN COMMUNICATION:

- Expresses written ideas and summary comments in a clear, concise way
- Follows acceptable standards and terms for recording account and other information
- Hand written notes are fully legible and recorded in proper space/form
- Letters to customers, staff, or committees, are professional and in keeping with positive relations
- Utilizes available technology (i.e., word processor) to create messages, letters, memorandums and other written forms of communication