

Junior Checking Clerk - Job Standards

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

KNOWLEDGE OF WORK:

Has a sound understanding of the organization philosophy and differences between organization and competitor financial institutions products and services, particularly Checking/Checking Account fees and charges, clearing rules and procedures
Knows how to perform a specified number of checking functions: clearings, exception/returned items verification, posting entries, receiving approval for handling exception items
Has general knowledge of deposit services and financial products
Is familiar with Products/Services Manual and knows how to access appropriate information

QUALITY OF WORK:

Uses telephone productively; returns all phone calls within one hour
Promptly deals with all checking account transactions, processes entries, corrections, amendments, record changes, exception processing, and correctly completes all daily work in a timely manner
within authority or in accordance with instructions received from supervisor
Knows how to effectively deal with dissatisfied customers and resolve dissatisfaction (i.e., NSF)
Confirms with customers that they have a correct understanding of products and services, fees and charges, floats, overdrafts, and related when difficulties arise

QUANTITY OF WORK:

Works to established standards for processing each type of transaction (e.g., NSF items, transfer from/to other accounts, stop payments, wire transfers, direct deposit transactions)
Successfully cross sells an average of three organization products daily
Cross-sells overdraft protection and line-of-credit to checking account users daily
Deals with routine checking account issues and resolves in a timely manner

PLANNING AND ORGANIZATION:

Maintains a neat and organized work area; has tools and supplies readily available to help serve customers and complete duties and responsibilities
Seeks the help of co-workers and/or supervisor when needed, to complete a task
Schedules/plans desk work during non-peak times, thereby being generally available to customers
Anticipates traffic flow variances (i.e., 1st of month, statement mailings) and organizes work accordingly to respond to demands