



# ARBOR BANK

*Helping You Grow*

**Job Title: Relationship Specialist**

Reports to: Relationship Manager

Full or Part-Time: Full-Time

Office Location: Omaha and Elkhorn

Position Type: Non-Exempt

Hours: Monday thru Friday: 7:30 am to 6:00 pm, Every other Saturday 8:30 am to 12:30 pm

**Summary Description Relationship Specialist**

The Relationship Specialist is responsible for providing teller transaction services by developing, managing, and retaining relationships with customers. This person, independently and/or collaboratively, works with bankers and office staff to actively grow the mission of Arbor Bank. This person visits with customers for the purposes of providing customer service, relationship building and cross-sell. This person will independently handle moderately complex to complex customer issues and problems. This person actively participates in the community in order to market and promote the bank's products and services.

**Detailed Responsibilities**

- Provide customer service by accurately and completely providing teller services.
- Scan proof transactions
- Provide customer service for all deposit account products and services included (but not limited to) checking accounts, savings accounts, certificates of deposit, health savings accounts, IRAs, safe deposit boxes.
- Remain customer-focused, respond promptly to customer issues, questions and concerns, provide consistent and effective service with an emphasis on customer retention and expansion.
- Develop new banking relationships with prospective clients and expand existing relationships with current customers through the sale and cross-sale of bank products and services.
- Proactively work toward achievement of personal and branch sales and customer service goals.
- Know the features and benefits of bank products and services.
- Project a professional image in dress, manner, communication, and focus.
- Demonstrate commitment, dependability, and respect for other team members with regular and predictable attendance, punctuality, and adherence to agreed-upon schedule of availability.
- Participate in community organizations and activities.

**Software Used**

- Precision Graphical
- Integrated Teller
- Business Process Manager
- Summit
- Altigen Max Communicator

**Skills and Experience**

- Minimum of 2 years demonstrated customer contact to include: customer service, bookkeeping, computer skills, problem solving.
  - Ability to define problems, collect data, establish facts, and draw valid conclusions.
  - Strong organizational skills.
  - Strong verbal and written communication skills required.
  - Ability and desire to work with team of employees across multiple locations.
  - High level of proficiency with organizing, facilitating, leading and negotiating with team of bank personnel to solve customer problems.
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