



First National Bank Job Description

Title: Receptionist

Department: Reception

Reports to: AVP Transaction Banking Manager

Classification: Non-exempt

Position Summary: The Receptionist position will report directly to the AVP Transaction Banker Officer. Primary responsibility of this position is to help deepen customer relationships and improve customer service. This position is responsible for greeting and directing walk-in customers in a friendly, professional manner and answering all in-coming calls on the switchboard. The Receptionist will also be responsible for providing administrative support to the Lending Department. These duties will include maintaining consumer collateral files, creating letters, and mailing for the loan officers.

Customer Service:

- Greet customers and answer phone calls, and direct them to the proper employees.
- Send out welcome letters to customers who have opened new or additional accounts with the bank daily.
- Double-check changes made to customer's online banking to see if the changes have actually been implemented.
- Send greeting cards to customers and employees for deaths, birthdays, new babies, retirement, thinking of you, get well soon, and anniversaries.
- Update a list of cards sent out on the Intranet and again in a private spreadsheet for more information about individual reasons why a card was sent out.
- Send letters with customer's MCO numbers when they sign up for online banking
- Receive reports every month with a list of all the customers who are turning 12, 18, and 19 in the upcoming month. Send letters out to each of them informing them of changes in their accounts.
- Check bank's faxes and emails every 10 minutes and forward any that has come in to the appropriate employees.
- Check voicemails as much as possible
- Hold onto envelopes and other such things for personal or commercial bankers who have customers who wish to pick something up quickly.
- Scan batches from tellers of driver's license from non-customers trying to cash checks.
- Once a years around June/July, send out a notice of privacy that is sent to all customers.

Loan Servicing Support:

- Keep track of and deposit CD interest checks from other banks daily
- Scan batches brought to the bank in a timely manner by Retail Bankers and Lisa Peterson for the Deposit/Identity queue (account processing), Retail Banking queue (CLP), Cash Management queue (Lisa Peterson).
- Occasionally send out letters for Dave Huser.
- Receive referrals from all of the tellers, personal bankers, and commercial bankers and compile them into a huge system of spreadsheets so that we can log every kind of referral, who was referred, who they were referred to, and if they actually went through with the referral for every person and branch, along with the total referrals for the entire bank.

Other:

- Open and sort Executive Vice President's mail every morning
- Prepare the monthly employee birthday and anniversary cards for Rich Carlson to sign and then send them out throughout the month.
- Update Who's Working Saturday spreadsheet that shows who will be gone for the week and on what days and post on the Intranet.



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- Create UPS labels and print them along with receipts for employees who need to send mail through UPS.

Competencies:

- **Customer Orientation:** respond sensitively to the needs and priorities of the customer, recognize and take appropriate action to meet their needs, establish an effective working relationship with customers to gain their respect and loyalty.
- **Oral/Written Communication** express thoughts and ideas in a clear concise manner to a variety of audiences and to all staff members.
- **Professionalism:** project a positive image of the bank to all internal and external customers.
- **Time Management:** effectively manage one's time to complete work according to establish deadlines and prioritize tasks to make the best use of time for high priority tasks.
- **Adaptability:** adjust quickly to different work situations, remain composed during stressful situations.

Education: High School (GED)

Experience/Knowledge/Skills:

- Experience in customer service
- People skills for when speaking with customers
- Customer service skills to be able to deal with problems with customers in a gracious manner.
- Skills with mail merges
- Confidentiality
- Management skills
- Problem-solving skills

Training:

- All BVS Training assigned
- Cross-training in customer service skills and security

List of software, tools, or other devices used by this position: Microsoft Office, Outlook, Softconsole, Gearplayer4, OnBase, Workflow for MCO, and Jack Henry (CIF 20/20).

Physical Demands: Actively listening, talk on the phone, squatting, lifting 50lbs, eye coordination, sitting, multitasking, and reaching.

I have read and understand this job description. I accept and understand these responsibilities.

Employee Signature: _____ Date: _____

The above statements are intended to describe the general nature and level of work being performed by the person assigned to this position. This position description does not state or imply that the above are the only duties and responsibilities assigned to this position. Employees holding this position will be required to perform any other job related duties requested by management.