

**Job Title** Branch Manager

**Short Description** Oversee an operationally sound branch (outages, errors, timely branch task completion). Engage in community organizations. Embodies the culture of Associated Credit Union by role modeling its mission, values, and service standards.

**Full Description** Position Description

Department: Retail Services  
Reports to: Retail Services District Manager  
Supervises: Branch Team  
Skill Levels: First Level Management

**Position Purpose**

The primary purpose of this position is to assist Associated Credit Union in living out its Mission: To offer members financial products that fulfill their needs, service that exceeds their expectations, and relationships that inspire their trust.

The Branch Manager is responsible for creating awareness of the Associated Credit Union brand within their market, as well as the day to day supervision of the branch while ensuring operations are performed in an efficient and cost-effective manner. This role is responsible for coaching, developing, supporting, and leading all retail team members to obtain individual, branch, and organizational growth goals while delivering an exceptional member experience. Additional responsibilities include: operations and referrals, hiring, developing, training, and terminations. Required to be a culture leader, branch champion, and business development leader in an effort to grow the branch's footprint. Engage in community organizations, community engagement, volunteerism, and join a board or committee. Oversee an operationally sound branch (outages, errors, timely branch task completion). Embodies the culture of Associated Credit Union by role modeling its mission, values, and service standards.

**Essential Functions & Core Duties**

**Set Tone For Experience and Culture**

- Sets the tone for providing exceptional member service and experience by role modeling ideal performance with team.
- Delivers superior quality through sound execution and a commitment to continuous improvement.
- Works together with team in a united way to drive toward team success.
- Focuses on the success of our members, team members, and community.
- Takes ownership and responsibility for decisions and

actions made at the individual and branch levels.

- Continually seeks ways to improve branch operations and productivity.

#### Maintain Operational Soundness

- Encourages the team to run an operationally sound branch.
- Identifies and coaches to eliminate errors and cash outages that impact service. Periodically verifies cash in possession of branch team and cash on the premises.
- Owns the resolution of all issues that impact service in the branch.
- Conducts regular huddles to keep team up to date with new information and discuss any issues or concerns of the team and members.
- Reviews branch goals with District Manager during weekly calls and monthly onsite visits.
- Reviews individual goals during periodic coaching sessions.
- Operates the branch in accordance with established Credit Union policies and within legal and regulatory requirements.

#### Generate New Business

- Develops an individual strategic branch plan to communicate and implement direction of the branch consistent with Associated's annual strategic plan and vision.
- Proactively solicit new business through referrals and member engagement.
- Participates in community engagements to understand how ACU can be a positive influence in the communities in which we serve.
- Evaluates trends and monitors member behavior to identify opportunities and solutions for both the member and the credit union.
- Educates members on products and services that meet their financial needs to increase member usage.
- Meet or exceed personal and branch goals through member referrals and ensuring that member's requests and questions are promptly resolved and satisfied.
- Uses business analytics to measure and expand member relationships within assigned branch footprint.
- Actively participates in marketing promotions and community opportunities.

#### Develop a Motivated and Well-Informed Staff

- Provides professional development opportunities to all branch team members to see continued referrals and service improvements.
- Participates in ongoing training with team in regard to member engagement, operations, products and services, and policies.
- Responsible for the growth and success of branch team

through ongoing training, coaching, supervision, and support.

- o Tracks individual progress and conducts performance appraisals on each team member at least annually.
- o Recommends promotions for team members as appropriate.
- o Recommends leadership training to team members seeking management opportunities.
- o Formulates and implements corrective action plans for poor performers as needed and refers action plans to District Manager for review and approval.

#### Create Raving Fans

- Leads by example to create raving fans in all interactions in the branch from basic interactions to crucial conversations.
- Coaches and educates the team to engage, empower, and elevate in such a way to provide an awesome experience in every interaction.

#### Other Duties & Responsibilities

- Keeps management informed of branch activities, progress toward established goals, and of any significant problems. Requests assistance when necessary.
- Ensures proper maintenance and general housekeeping of the building, grounds, work areas, desks, and equipment, including inclement weather responsibilities by communicating with the Facilities team.
- Maintains current knowledge of industry trends, opportunities, channels, products, and services. Must develop a strong understanding of business processes and workflows for the business unit(s), as well as, understanding the underlying technologies supporting business functions.
- Approves all paid time off, overtime, and timecards for each branch team member. Keeps accurate payroll and attendance records.
- Comply with all regulations when performing all job requirements and stay abreast of updates/requirements of any other compliance or regulatory activities through completion of training courses assigned annually by the Training and Development Department.
- Participates in the Retail Services Continuing Education Program.

#### Qualifications

Education: An Associate's Degree in Business Administration, Management, Marketing, Finance, or related field or equivalent work experience is required. Bachelor's Degree from an accredited college or university is desirable.

Experience: Minimum of five (5) years of related credit

union or banking experience, with a minimum of three (3) years of supervisory or leadership experience. Must be proficient with the Microsoft Office Suite (Word, Excel, and Outlook) or similar software programs. Knowledge of Jack Henry's Symitar – Episys or MeridianLink is a plus.

#### Core Competencies:

- Member Focused: proficient in anticipating member needs and taking the initiative to drive solutions in effective value-added ways.
- Self-Motivated: strong work ethic along with an enthusiastic and passionate approach to one's work with minimal supervision. Ability to self-manage timelines and deliverables.
- Operational Soundness: thorough in-depth knowledge of Credit Union products and services and familiarity with Retail Services functions, policies, and procedures.
- Communication/Interpersonal Skills: ability to articulate and present different points-of-views on various topics with the proven ability to transfer knowledge and effectively present in a variety of formal and informal presentation settings: one-on-one with members and team members, small and large groups, with Senior Management. Maintain good business writing skills and active listening.
- Teaming: ability to work well with your retail team and other business units to achieve a shared goal or outcome in an effective way.
- Time Management: effectively prioritizes tasks to use time efficiently and attend to a broad range of activities. Ability to manage work efficiently and effectively and manage shifting priorities and carry-on through task completion.
- Decision-making/Judgment: ability to make prudent decisions that are timely, well researched, reflect awareness of impact, and are consistent with ACU's strategic objectives and are in line with accomplishing goals.
- Attentiveness to Detail: demonstrates keenness while exploring the issue or topic at hand as well as issues surrounding it and reasons behind it. Takes thoroughness to a new level and energizes other colleagues to work carefully.
- Problem Solving: identify problems in a timely manner, research and develop alternative solutions, and resolve problems in early stages. Must be capable of breaking problems into component parts and addressing each individual issue in order to develop an appropriate thorough solution.
- Strategic Focus: identify and develop needs and strategies that create a better Credit Union for the members and staff. Strong knowledge of the general organization structure of financial institutions and business processes, as well as current knowledge and general understanding of financial products/service advancements and operating trends.

- Results Focused: ability to establish realistic and specific goals for self and others and keep the branch on track toward goal achievement – instilling in others a sense of urgency and motivate others to accomplish expected business and member service results.
- Empathetic: possess a congenial attitude by being personable and tactful. Ability to relate well with others.
- Organizational: ability to stay focused on different tasks, and use your time, energy, strength, and mental capacity effectively and efficiently in order to achieve the desired outcome.
- Accountability: ability to hold self and others accountable for achievement of key results and to persevere through challenges, setbacks, or difficulties.

#### General Operational Requirements:

- Must be flexible in scheduling own work time to accommodate responsibilities which may require scheduling before or after operating hours and weekends.
- Combined sitting, standing, and moving throughout the workday to accomplish tasks or engage the membership and team.
- Exerts up to 30lbs of force occasionally.

#### Performance Metrics

- Member Experience
  - o Driving member loyalty and ensuring members needs are met. (i.e. NPS Score, Member Effort Score, etc.)
  - o Branch engagements, referral activities, expenses, and profitability are in line with Credit Union standards.
- Account Growth
  - o Membership growth by attracting new members. (i.e. New members / Accounts per branch)
  - o Member referrals and engaging new and existing members. (i.e. Referral requests per branch; Products Per Member; etc.)
  - o Maintain strong relationships with local SEGs and communities.
- Member churn
- Talent Management
  - o Celebrate successes; Catch your team doing things RIGHT.
  - o Coach, counsel, and guide staff in any area needing improvements.
  - o Branch personnel are well trained and efficient, and their activities well-coordinated.
  - o Employee reviews are completed and delivered on time.
- Employee churn
- Branch Optimization
  - o Branch performance comparison with the other branches and with the industry standards to ensure that the branch is performing optimally.
  - o Branch services are efficiently and effectively delivered in accordance with established Credit Union policies and

standards. (i.e. Teller Transaction Cycle Time; Lobby Wait Time; Number of Appointments, etc.)  
o Responds to any audit findings for branch. (i.e. Internal Audit findings, QC findings, operational discrepancies, etc.)  
o Ensures branch security. Opens and closes the building in accordance with set hours and test security equipment quarterly.  
• Continuing Education Program  
• Staff readiness for increased responsibilities.

<b>Education</b>	High School
<b>Additional Comments</b>	Branch Manager at our Norcross branch
<b>Credit Union</b>	Associated Credit Union
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<b>Expiration Date</b>	04/30/2023