

**Float Universal Banker
(CSC)**



*Salary Grade: 6
Non-Exempt*

JOB TITLE: CSC Float Universal Banker

DEPARTMENT: Customer Solutions Center

REPORTS TO: Solutions Center Manager

Position Summary: As a member of the Retail Banking/Customer Solutions Center team, the CSC Float Universal Banker will be responsible for ensuring customer satisfaction by providing outstanding service and creating a positive overall experience for every customer. Develops and enhances customer relationships to contribute to the branch, and Bank, success. Processes routine transactions accurately and efficiently, resolves customer service issues, and pro-actively turns service opportunities into sales events. Under general supervision and in compliance with established policies and procedures, the Float Universal Banker will provide support to the Customer Solutions Center. This role will perform a variety of call center related tasks, such as assisting customers and potential customers with their telephone requests, explain services, respond to problems and direct calls to the appropriate department, when necessary.

Branch Functions:

- Processes all customer transactions in strict adherence to bank procedures, including savings; check; bond; cash; mortgage, consumer, and other loan payment; and night deposit transactions
- Meets or exceeds defined sales, referrals, and service goals
- Processes transactions on the bank's operating system(s)
- Explains, promotes, sells, and/or cross-sells products and services based on customers' needs and meets or exceeds defined individual sales, referral, and service goals
- Retains/acquires business (Retail and Commercial) relationships through participation in active calling of existing customers and prospects. Refers customers to business partner expert for mortgages and loans, financial services and commercial business needs
- Serves as a primary contact for customers; accurately performs routine account transactions; opens and closes accounts; and assists customers in service inquiries
- Employs problem-solving skills and sound judgment and recommends appropriate solutions to resolve customer problems, concerns, requests
- Meets branch operations and security requirements in the opening and/or closing of the branch on a rotating basis and in the balancing of the cash vaults and ATMs. Adheres to compliance procedures and operational risk controls in accordance with any and all applicable regulatory requirements, standards, and bank policy
- Comply with SAFE Act requirements and Obtain/maintain a unique NMLS number

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- Actively participates in community activities, represents Dime Bank in a favorable and professional manner
- Fills in at multiple branch locations, as assigned, as well as at the Customer Solutions Center

Customer Solution Center Functions:

- Responsible for performing a broad variety of customer requests received over the phone and internet.
- Provides information relative to The Bank's accounts, products and services, and processes requests within scope of knowledge and authority.
- Identifies cross-sell opportunities and cross-sells products and services to new and existing customers.
- Resolves customer requests and questions promptly, courteously and professionally.
- Provides an excellent customer experience by relating well to the customer, thinking and exercising sound judgment and acting responsibly in the customer's and Banks best interests.
- Verifies specific customer information to ensure accurate transaction processing and to prevent the misuse or intentional fraud of this delivery system.
- Assists customers with financial planning by making referrals to wealth management
- Assists callers with loan inquiries and rate information. Makes referrals to branches.
- Maintains record of all calls, sales and other necessary data for report generation and follow through.
- Responsible for end of day balancing and other operational tasks as business needs dictate.
- Performs other related duties as assigned.

Knowledge, Skills, Requirements:

Requires a high school diploma or its equivalent and an adherence to the bank's training policies and requirements.

- 1-2 years of experience in a call center/sales and customer service environment. Prior experience in a financial/banking environment preferred.
- Must have a high degree of technical aptitude and must be able to communicate technical information to non-technical users.
- Ability to troubleshoot and resolve advanced technical issues for end users.
- Strong organizational skills and attention to detail.
- Ability to work well under pressure in a fast paced environment.
- Ability to effectively communicate both verbally and orally with other employees and outside entities.

Physical Demands and Condition Requirements:

- General office environment
- Standing and/or sitting for extended periods of time
- Ability to lift bags of coin

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Equipment Used:

- General office equipment, i.e., calculator, photocopier, etc.
- Computer
- Coin machine
- Bill counter

ADA: The employer will make reasonable accommodations in compliance with the Americans with Disabilities Act of 1990.