

# ALLEGIANCE BANK TEXAS

## POSITION DESCRIPTION

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<b>TITLE:</b>	<b>Office Manager</b>		
<b>FLSA:</b>	<b>Exempt</b>		
<b>SEGMENT:</b>	<b>Branch</b>	<b>LOCATION:</b>	<b>Woodway West</b>
<b>CATEGORY:</b>	<b>Full Time</b>	<b>REPORTS TO:</b>	<b>Bank Office President</b>
<b>SHIFT:</b>	<b>Monday-Friday; 8:00 a.m.–5:00 p.m.</b>	<b>DATE:</b>	

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### SUMMARY

The Office Manager is responsible for the administration and efficient daily operation of a full service banking office, including operations, regulatory compliance, product sales, customer service, and security and safety in accordance with the Bank's objectives. Develops new deposit business; provides a superior level of customer relations and promotes the service culture through coaching, guidance and staff motivation; achieves individual and office goals through new business sales, referrals and retention of account relationships. Provides leadership, training and supervision. Participates in community affairs to increase the Bank's visibility and to enhance new and existing business opportunities. May perform additional duties as directed by the Bank Office President and Director of Operations.

Assures compliance with all Bank policies and procedures, as well as, all applicable state and federal banking regulations.

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### ESSENTIAL DUTIES

1. Reinforces the application of superior customer service through his or her example along with appropriate follow through with involved customers and employees; conducts specific periodic meetings and presentations on this topic with all staff members.
2. Engages in business development activities and solicitation of new business prospects; actively involved in instilling and maintaining a positive service environment through education of the Bank's products and services; investigates and follows up on significant changes in status of existing customers; motivates and monitors staff in product presentation; meets with customers to discuss needs or concerns and outlines appropriate Bank services.
3. Ensures organization of the bank office, coordinating available resources (e.g., staff, materials, etc.) for maximum results.
4. Assures audit compliance and procedure quality control and recommends and initiates corrective actions; ensures that the bank office is in compliance with established Bank policies, procedures and state and federal regulations.
5. Contributes to the overall profitability of the branch; implements costs controls, income generation, and branch marketing efforts; monitors expenses to ensure compliance with budget.
6. Works closely with the staff in resolving inquiries and providing managerial support; participates in various internal committees as coordinated with the Bank Office President.
7. Maintains knowledge of security and safety policies and strictly adheres to established procedures; works closely with the Bank Security Officer to maintain an updated plan for the banking office; ensures bank office staff is properly trained and made aware of any changes to the office's plan and procedures.
8. Participates and directs day to day operations for the bank office; approves large deposits and withdrawals; reviews and acts on daily reports; ensures the bank office is maintained in a neat, clean and attractive manner; recommends redecoration or major repair or redesign of floor space as necessary.

9. Ensures effective communication to staff and implementation of all policy and procedure changes as approved by Senior Management; schedules and conducts any necessary training for staff.
10. Works closely with the CRA Officer and promotes the Bank's CRA policies and programs; participates in various professional, civic and community activities; forwards all related documents, comments or requests to the CRA Officer; responsible for the administration of the branch's CRA public file.
11. Reviews NSF and overdraft reports for customers assigned within his or her portfolio; approves or declines such exceptions within established lending limits.
12. Coordinates Remote Deposit Capture installations with core vendor. Installs equipment, trains the customer on the proper usage and process of the Remote Deposit Capture product, provides support to customers with questions regarding Remote Deposit Capture.
13. Maintains an advanced knowledge of financial industry status and trends.
14. Consistently applies superior decision making techniques pertaining to inquiries, approvals and requests as they apply to existing policies and procedures, keeping within assigned approval limits and using these instances as learning tools for employee development.
15. Plays a positive role in the development and growth of assigned bank office staff through excellent communication skills, both verbal and written, along with strong delegation skills assuring a highly cross trained staff.
16. Performs personnel actions including performance appraisals, disciplinary actions, and interviewing candidates for employment; supervises the daily activities of the bank office including, but not limited to, effective delegation of assignments, developing work schedules and providing necessary training.
17. Processes, solves and answers complex customer transactions, problems or inquiries.
18. Operates computer terminal or personal computer to process account activity, determine balances and resolve problems within given authority.
19. Answers telephones, answers questions and directs callers to proper Bank personnel.
20. Assumes responsibility for various bank office functions in the absence of staff members or in overload situations.
21. Treats people with respect; keeps commitments; inspires the trust of others; works ethically and with integrity; upholds organizational values; accepts responsibility for own actions.
22. Demonstrates knowledge of and adherence to EEO policy; shows respect and sensitivity for cultural differences; educates others on the value of diversity; promotes working environment free of harassment of any type; builds a diverse workforce and supports affirmative action.
23. Follows policies and procedures; completes administrative tasks correctly and in a timely manner; supports the Bank's goals and values; benefits the Bank through outside activities.
24. Performs the position safely, without endangering the health or safety to themselves or others and will be expected to report potentially unsafe conditions. The employee shall comply with occupational safety and health standards and all rules, regulations and orders issued pursuant to the OSHA Act of 1970, which are applicable to one's own actions and conduct.

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### **SECONDARY DUTIES**

The position of Office Manager performs duties specific to the position and other functions as assigned.

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### **SUPERVISORY RESPONSIBILITY**

The position of Office Manager is responsible for the supervision of **2** or more employee(s), and normally carries out supervisory responsibilities in accordance with the Bank's policies and applicable laws, ensuring adherence to EEO guidelines.

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### **ENVIRONMENT AND PHYSICAL ACTIVITY**

The incumbent is in a non-confined office type setting in which he or she is free to move about at will. The position includes driving a personal owned vehicle (for Remote Deposit Capture installations, customer visits, and travelling to and from meetings) which includes exposure to the outside weather elements and moving mechanical parts. It may include some minor annoyances such as noise, odors, drafts, etc.

The incumbent in the course of performing this position spends time writing, typing, speaking, listening, lifting (up to **15** pounds), driving, carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.

The incumbent for this position may operate any or all of the following: telephone, cellular telephone, copy and fax machines, adding machine (calculator), Remote Deposit Capture machine, ID Scanner, document scanner, money counter, computer and related printers.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

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### **MENTAL DEMANDS**

The incumbent in this position must be able to accommodate to reading documents or instruments, detailed work, problem solving, customer contact, reasoning, math, language, presentations, verbal and written communication, analytical reasoning, stress, multiple concurrent tasks, and constant interruptions.

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### **MINIMUM REQUIREMENTS**

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- Bachelor's degree from a college or university; or 5 years of related experience and/or training; or the equivalent combination of education and experience. Work related experience must consist of bank management operations, and supervisory background. Educational experience, through in-house training sessions, formal school or financial industry related curriculum, is required to be applicable to the financial industry.
- Bilingual (English/Spanish) required.
- Advanced experience, knowledge and training in progressively responsible bank office management and supervisory activities.
- Advanced knowledge of related state and federal banking compliance regulations, Bank operational policies and procedures, and the Bank's products and services.
- Knowledge of loan products and terminology.

- Intermediate sales and marketing experience.
- Demonstrated ability to cross-sell and explain all Bank products and services with confidence and authority.
- Ability to read, analyze and interpret general business periodicals, professional journals, and technical procedures.
- Excellent organizational and time management skills with the ability to provide leadership, supervision and training for 2 or more employees using positive supervisory techniques to ensure maximum productivity; demonstrated ability in organization and delegation skills.
- Intermediate knowledge of human resource labor laws and policies.
- Basic skills in computer operation; Microsoft Office software programs.
- Basic typing skills to meet production needs of the position.
- Advanced math skills; ability to calculate interest, and percentages; balance accounts; add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals; locate routine mathematical errors; compute rate, ratio and percent.
- Exceptional verbal, written and interpersonal communication skills, with the ability to apply common sense to carry out instructions and instruct others, train personnel, write reports, correspondence and procedures, and speak clearly to customers and employees.
- Thorough understanding of management procedures; ability to plan bank office activities (setting objectives, developing strategies, budgeting, and developing policies and procedures); initiative to organize various functions necessary to accomplish bank office activities; effectively staff (selecting, training and developing employees); directing employees towards the desired objectives (delegating, motivating, resolving problems); controlling the function (developing performance standards, measuring results, taking corrective action and rewarding employees as appropriate).
- Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.
- Ability to work with no supervision while performing duties.
- Current Texas driver's license and a vehicle with appropriate insurance coverage if required to drive in the course of performing assigned duties and responsibilities.

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Management reserves the right to change this position description at any time according to business needs.