



Customer Service Representative

Status: Non-Exempt

Position Summary

The Customer Service Representative serves as the first point of contact for customers. This role delivers exceptional customer service by processing financial transactions, assisting with digital banking services, and identifying opportunities to meet a customer's financial needs while ensuring compliance with bank policies and regulations.

Essential Responsibilities

Customer Service

- Provide prompt, professional service in person and by telephone.
- Process deposits, withdrawals, transfers, cashier's checks, and other routine banking transactions accurately.
- Assist customers with account maintenance, debit and credit cards, check orders, wire transfers, stop payments, address changes, mobile banking, online banking, and other bank products and services.
- Resolve customer questions and concerns while delivering a positive banking experience.

Sales & Referrals

- Identify customer needs and recommend appropriate products and services.
- Participate in bank sales campaigns and refer customers to lending, insurance, and other specialty departments when appropriate.

Cash Handling & Compliance

- Maintain accurate cash drawer and vault balances within established limits.
- Safeguard cash and confidential customer information.
- Ensure all transactions comply with bank policies and applicable regulations, including BSA, privacy, and funds availability requirements.

Teamwork & Professionalism

- Foster a positive, collaborative work environment.
- Adapt to changing priorities and assist team members as needed.
- Represent KodaBank with integrity, professionalism, and confidentiality both within the bank and throughout the community.

Other Responsibilities

- Perform other duties as assigned to support branch operations and the overall success of KodaBank.

Skills & Competencies

- Excellent customer service and relationship-building skills.
- Strong attention to detail and accuracy.
- Effective verbal communication skills.
- Professionalism, discretion, and sound judgment.
- Ability to identify customer needs and make appropriate referrals.
- Strong organizational and time management skills.

Preferred Qualifications

- High school diploma or equivalent.
- Two to three years of customer service and/or sales experience.
- Proficiency with computers, office equipment, and banking systems.

KodaBank is an Equal Opportunity Employer.