

UNIVEST FINANCIAL CORPORATION
JOB DESCRIPTION

POSITION: SSR - (RTL-0010)

LOCATION:

LEVEL: N 07

BASIC FUNCTION:

(Minimum standard 60% service, 40% sales)

Responsible for developing and maintaining personal banking relationships with new and existing customers and providing quality customer service. This position will guide customers to purchase bank products that meet their needs and use each customer interaction as an opportunity to introduce additional products and services to broaden the relationship. The incumbent will also be responsible for serving the bank's customers from the teller line by completing a variety of financial transactions following technical and operational guidelines. Time spent in various aspects of this role will vary depending upon Financial Center needs.

QUALIFICATIONS:

- High school diploma/GED or equivalency
- Attention to detail and ability to prioritize
- Experience in Retail Sales or Telemarketing with proven sales results
- Strong written/verbal/organizational skills
- Previous experience with MS Office Suite
- Neat, professional appearance following established guidelines for appropriate dress
- Successful completion of the following programs within 12 months of hire:
 - SSR training and certification
 - Consumer Loans training and certification
 - Teller training and certification
 - Univest University's "Pre-Supervisor" Certificate Program

BRANCH HOURS (Some locations may vary):

- Monday- Wednesday: 8 am – 4 pm
- Thursday: 8 am – 5 pm
- Friday: 8 am – 6 pm
- Saturday: 9 am – 1 pm (2-3 per month are required)

POSITION INCLUDES:

- Provide friendly, courteous, professional customer service
- Perform all teller and platform transactions promptly, efficiently, and accurately
- Adhere to all procedures including operational and corporate customer service guidelines

- Ability to operate required technology and applicable software on equipment including but not limited to computers, cash recyclers, iPads, ATMs, etc.
- Identify customer needs and cross sell opportunities to develop new business
- Engage in outbound calling to customers
- Develop knowledge and understanding of Univest Products and Services
- Leverage bank promotions
- Adhere to outlined sales flow
- Learn and become proficient in daily operational procedures
- Actively participate in branch activities, development and training programs
- Complete notary training if position is designated as notary for branch
- Responsible for compliance with laws and regulations that apply to the position, including the Univest Code of Conduct
- Perform additional duties as required

PHYSICAL DEMANDS:

The physical demands described below must be met by an associate to successfully perform the essential functions of this job. Accommodations will be made as necessary to enable individuals with disabilities to perform essential functions.

- Frequent sitting, standing and walking.
- Frequent operation and use of computer.
- Ability to regularly lift up to 75 pounds and maneuver technical supplies.
- Frequent stooping, bending, crouching, reaching or crawling.
- Position requires manual dexterity and the ability to use hands/fingers, touch and feel.
- Must be able to talk, see, hear and write.
- Specific vision abilities include close vision, distance vision, depth perception and ability to adjust focus.

COGNITIVE DEMANDS:

The cognitive demands described below must be met by an associate to successfully perform the essential functions of this job. Accommodations will be made as necessary to enable individuals with disabilities to perform essential functions.

- Position requires adequate judgement, decision making, reasoning, and comprehension and stress control.
- Incumbent must have the ability to efficiently problem solve and assess technical issues/tasks.
- Must be able to understand and follow basic instructions and guidelines, complete routine paperwork, as well as prioritize work schedule.

WORK ENVIRONMENT:

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. This position operates in a typical office environment and may include transporting supplies and services to different offices. Employees will encounter average indoor conditions and noise. Accommodations will be made as necessary to enable individuals with disabilities to perform essential functions.