

Branch Manager

Job Description

Full-time/Exempt position
Reports to Chief Operating Officer
Location: HQ in DC

Objective:

Reporting to the Chief Operating Officer (COO), the Branch Manager is responsible for directing and administering the operational efforts of the branch, which will function remotely and in-person. The Branch Manager oversees provision of a full range of services to members and prospective members. They also train, direct, and supervise the branch staff. The incumbent is accountable for maximizing revenues, sales, member satisfaction, and minimizing operational losses, as well as deepening existing relationships and minimizing member attrition. They also ensure that established policies and procedures are followed.

Responsibilities:

- Manages direct reports to maximize productivity, efficiency, and the potential of branch staff, including: hiring, directing job assignments, designing performance plans, assigning goals, monitoring performance, coaching, counseling, training, assuring compliance with regulatory requirements and organizational mission, values, policies and work rules. Appraise performance and provide recommendations for staff compensation, promotion, and termination, as appropriate.
- Maintains appropriate staffing levels to handle both in-person and digital branch demand in a timely manner.
- Designs and presents monthly reporting on branch KPIs and provides analysis and recommendations based on results.
- Completes orientation of new employees in overall branch procedures. Actively participates in cross-training personnel and ensures that the staff is kept abreast of all products and services, promotions, and other company initiatives. Conducts branch security training.
- Ensures personnel is well trained in all phases of their respective jobs.
- Directs hiring, employee development, branch performance management, and compensation review for branch staff.
- Oversees the facilities and equipment of the branch office to ensure the branch is always presentable.
- Develops and implements department budget; reviews monthly to analyze variances and ensure expenditures remain within limits.
- Monitors closely industry trends in deposit operations to propose development activities and ensures that the company's products, services and processes are remaining competitive.
- Ensures members' requests and questions are promptly resolved. Handles members' complaints. Ensures members are informed of Company services and policies. Counsels members regarding their financial needs and services requested.
- Investigates and resolves member complaints, and researches member situations to resolve issues involving fees, deposit servicing, etc.
- Becomes subject matter expert in all branch software.

- Troubleshoots and resolves internal and external inquiries.
- Enhances and update all branch procedures.
- Ensures all branch transactions are balanced at the close of each day. Oversees individual accountability for the handling of cash and assists in resolving balancing problems.
- Prepares month-end management reports which apprise executive management of the status of branch activities.
- Must comply with applicable laws and regulations, including but not limited to, the Bank Secrecy Act, the Patriot Act, and the Office of Foreign Assets Control, in addition to all company policies.
- Performs other duties and projects as assigned.

Requirements:

- B.S./B.A. in business, management or similar field (preferred)
- 5-7 years of Credit Union or Bank work experience
- Prior supervisory or management experience preferred
- Bilingual with fluency in Spanish and English is a mandatory requirement to perform in a multicultural environment
- Strong commitment to the IDB Global FCU mission and understanding of cultural competency
- Strong listening skills – must be able to listen and comprehend members inquires or concerns to provide a valuable solution.
- Strong communication skills – verbal and written. Must feel comfortable speaking in public and making presentations in a professional manner to a variety of groups on behalf of the credit union
- Strong analytical skills with proficiency in excel
- Teamwork – contributes to building a positive team spirit
- Quick learner, detail oriented and effective at managing and prioritizing multiple tasks
- Sales Management experience in a financial institution, retail or service industry
- Training – Must cultivate a learning, training and advancement environment
- Ability to make objective observations, examinations, evaluations and recommendations
- Strong leadership skills and proven experience managing in retail and/or in a financial institution
- A track record of successful business performance, goal setting and achievement
- A proven leader, effective at hiring, developing and motivating individuals and teams
- Strong computer skills, along with expert knowledge of Microsoft Office (Word, Excel, PowerPoint) and traditional office products (copiers, fax machines, ten-keys, etc.)
- Problem Solving – Identifies and resolves problems timely
- Customer Service – Acknowledges greets and responds quickly to member needs; responds to requests for service and assistance
- Interpersonal – Remains professional when dealing with negative situations