



Position Description

Position: Retail Program Manager
Reports To: Head of Consumer Banking
FLSA Classification: Exempt

Organization Overview:

Foresight Bank is the largest, locally owned community bank in Northern Illinois, with fifteen offices in the counties of Winnebago, Stephenson and Kankakee. Foresight Bank is owned by Foresight Financial Group, Inc., an Illinois corporation founded in 1986, a financial holding company established under the Federal Reserve.

Position Summary:

The Retail Program Manager is responsible for the overall implementation and growth of the AtWork Program, Prestige Plus Club, and other Retail Programs. Acts as the point of contact for identified Foresight Bank Consumer Programs. Develop new business and expand existing customer relationships. Administers all activities directly related to identified Foresight Bank Consumer Programs. Works with Head of Consumer Banking to provide strategic alignment to Retail Banking.

Primary Responsibilities:

1. Administers all duties related to the AtWork and Prestige Plus Club to include but not limited to:
 - a) Plans calendar of events consisting of day trips, extended tours, and educational seminars, AtWork seminars, employee benefits fairs, etc.
 - b) Compose and distribute information on programs on a consistent basis.
 - c) Proactively solicit new membership.
 - d) Participate in community events to promote the Program across all markets.
 - e) Prepares the monthly reports.
 - f) Communicates the activities and proper maintenance/tracking.
2. Collaborate with Marketing officer to coordinate the production and media placement of advertising materials.
3. Works with Head of Consumer Banking to help develop strategies, launch sales initiatives, and set clear expectations around AtWork & Prestige Club
4. Work closely with Head of Consumer Banking and marketing to create, launch, and support products and services that support the growth of Retail Programs.
5. Coach and train staff at retail branches on the benefits and services of the program, including delivery of services and value propositions.
6. Demonstrates commitment to service excellence to all individuals, both internally and externally.
7. Develop new business and expand existing relationships.
8. Promotes and cross-sells other bank products and services as appropriate to customer needs.
9. Provides ongoing relationship service with current customers to maintain goodwill and gain additional business by utilizing the Customer Profile Sheet and Customer Contact Process to ensure proper follow-up with new and existing customers.
10. Informs and advises customers of status or enhancements to current account productivity and suggests resolution on account disputes and other account activity.
11. Responds to customer inquiries and requests regarding accounts.



- 12. Completes other projects and duties as assigned by the manager.
- 13. Maintain compliance with and adhere to all state and federal regulations and bank policies and procedures, including, but not limited to Bank Secrecy Act, FACT ACT, Community Reinvestment Act, and EEO/AA/Fair Employment Practices.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Competencies:

- Leadership: Effective knowledge and skills in leading a team with a strategic vision and achieving such through empowerment, collaboration, communication, team building, and mentoring.

- Customer Service Champions superior treatment of customers by responding promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments; and manages difficult or emotional customer situations.

- Business Acumen/
Financial Management: Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals.

- Communicator: Strong interpersonal and project management skills, with emphasis on oral and written communication directed at both internal and external parties. Responds promptly to needs and requests.

- Organizational Focus, plan, and prioritize work in a systematic way to complete tasks and projects with a team and independently, by established deadlines and in a fast-paced environment. Able to determine priorities and allocate resources effectively.

- Technical: Microsoft Word, Excel. And PC skills. Advanced knowledge of Jack Henry, Deposit Pro, and Laser Pro Software.

Position Performance Standards:

- Meet Annual Sales Goals.

- Meet annual membership and bank deposit goals.

- Execute all planned events within the scope of control.

Performance Weightings:

40% Competencies



60% Position Performance Standards and Personal Goals

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. High school diploma or general education degree (GED). An Associates or Bachelor degree in a related field preferred. Two years Retail Banking experience required; or equivalent combination of education and experience required.

Physical Demands and Work Environment:

This job operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, copy machines, filing cabinets and fax machines. The physical demands described here are representative of those that must be met by a Team Member to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This position requires manual dexterity. While performing the duties of this Job, the Team Member is regularly required to sit or stand for extended periods of time.

I understand the requirements and essential functions and duties of this position.

Retail Program Manager

Date

Head of Consumer Banking

Date