



Position: Teller Lead

Reports To: Assistant Branch Manager or Branch Manager

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 Teller Lead ensures accurate oversight and direction of the teller department of assigned division(s), championing high touch service to customers, effective, and consistent teller operations. Lead the team in excelling in teller operational soundness and efficiencies and referrals. Serves as reference point for all teller operations.

Primary Responsibilities:

1. Supervises operations functions of branch to achieve established departmental and branch goals.
2. Responsible for scheduling and ensuring proper staffing to ensure service levels to customers are maintained.
3. Ensure that all teller transactions are processed accurately and in compliance with bank policies.
4. Assist in finding offages when needed
5. Approves transactions that exceed Teller limits and assists with complex or difficult transactions.
6. Expected to act in the capacity of a Teller, when needed.
7. Ensure high levels of customer satisfaction by managing and addressing customer needs and expectations.
8. Assist in recruiting and maintaining top talent at the branches.
9. Monitors operational performance and provides coaching to the tellers and feedback to the manager when needed.
10. Provide feedback for branch meetings regarding operations to ensure communication, promotion of goal achievement, changes in policies and procedures, etc.
11. Monitors cash levels in teller drawers, TCR's, and branch/s.
12. Works with Compliance Officer and Training and Development to identify and train staff on changes in policies and procedures.
13. Responsible for Teller audits, maintains audit controls and ensures no repeat violations.
14. Manages day-to-day activities to ensure compliance with auditing procedures, policies and banking regulations.
15. Maintains prescribed security controls to protect the bank against unnecessary risk and exposure and criminal fraudulent operations.



16. Partners with Branch Manager to promote the bank and ensure staff have tools needed to promote products and services to customers.
- ~~17.~~ Support sales initiatives by generating referrals.
- ~~18.~~ Train & Develop team in operational compacity.
- ~~19.~~ Field customer calls when needed to provide customer service and support to the branch team.
20. Provide leadership and management to the branches in the absence of the Branch Manager.
21. Undertake special projects and/or assignments as needed.
22. Ensures compliance with all Bank policies and procedures and all applicable state and federal banking laws, rules and regulations including Bank Secrecy Act and Anti Money Laundering to assist management in monitoring for suspicious activity, money laundering, or other illegal customer activity.

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 department with a strategic vision and achieving such through empowerment, collaboration, communication, team building and mentoring.
- Business Acumen/
Financial Management: Understands business implications of decisions; Displays orientation to profitability; Demonstrates knowledge of market and competition; Aligns work with strategic goals.
- Customer Service: Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments.
- Communicator: Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information. Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions.
- Technical: Advanced knowledge of Microsoft 365. Proficient in Jack Henry, Deposit Pro.

Physical Demands and Work Environment:

This position operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, copy machines, filing cabinets and fax machines. Occasional lifting of 25-50 pounds may occur. The physical demand described here are representative of those that must be met by staff 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 position, the employee is regularly required to sit or stand for extended periods of time.

Performance Standards:

Meet established revenue and quality standards and goals as established annually.

Successful exams and audits without significant findings.

Actively participate in a minimum of one community-focused organization annually.

Performance Weightings:

40% Competencies

60% Position Performance Standards and Personal Goals

Qualifications:

HS diploma/equivalent and commiserate work experience required. The ideal candidate has a minimum of 1 year of Teller experience and 0-1 year in a leadership role in retail, sales role at a bank. Proven success in meeting profitability goals. Aptitude for leading successful teams is a must.

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

Teller Lead

Date

Branch Manager

Date