

<b>Job Title:</b>	Branch Sales Manager	<b>FLSA:</b>	Exempt
<b>Division:</b>	Banking	<b>Revision Date:</b>	05/18/2020

**Position Purpose:**

Position is responsible for managing all aspects of the office, creating a fun professional atmosphere and ensuring the offices runs efficiently. Responsible for engaging with the general public and Hy-Vee employees to build relationships with Midwest Heritage banking, investment and insurance.

**Essential Functions:**

Office Management:

- Oversees the preparation of staff schedules, maintenance of attendance records and other sales and operational reports.
- Maintains a satisfied customer base by efficiently handling customer transactions.
- Responsible for ensuring ITM, printer/copier and network, etc. are functioning efficiently

Sales:

- Coordination with Hy-Vee to host new hire orientations and work with employees on product offerings.
- Aggressively cross-sells bank products or services to existing and potential customers through in-person sales sessions as well as by phone, written correspondence and external sales calls.
- Maintains knowledge of all products and services offered.
- Develops new and maintains existing relationships with customers.
- Assists with consumer loan applications by interviewing applicants, gathering financial and related data, submitting file to an officer who will establish credit worthiness.

Customer Service/Operations:

- Assists customer care with responding to customers via phone, email and/or chat
- Provides friendly, efficient, and accurate assistance to internal and external customers.
- Answers questions or resolve complex technical problems on customer accounts, OAC, online/mobile banking, etc.

Backup and Other:

- Facilities Management
- Order supplies as needed
- Reports to work when scheduled and on time.

**Secondary Duties and Responsibilities:**

- Actively participates in regional and company training programs, sales seminars and management meetings.
- Performs other job-related duties and special projects as required.

**Knowledge, Skills, Abilities Required:**

- Seeing and hearing well enough to communicate with customers in person and on the telephone.
- Dexterity to handle papers and use computers.
- Employee management skills are necessary.

**Education, Experience, and Other Requirements:**

- Education/experience equivalent to a four-year degree in finance, business administration, marketing, or related field, plus two or more years of experience in banking, financial services, marketing, or sales.
- Must have an active Nationwide Multistate Licensing System (NMLS) number. NMLS number must be maintained and all requirements adhered to. For employees new to the position the NMLS number must be obtained within 60 days.

**Reporting Relations:**

Accountable and Reports to: VP, Retail Sales Manager  
Supervisor Responsibilities:

**Working Conditions and Physical Requirements:**

- The duties of this position are normally performed in a general office setting. This is a fast paced work environment.
- This position is classified sedentary/light and requires the ability to sit for long periods of time.
- There is frequent pressure to meet deadlines and handle multiple projects in a day.
- Visual requirements include: ability to see detail at near range with or without correction.
- Must be able to perform the following physical activities: sitting for long periods, talking (in person and by telephone), hearing and repetitive motions.

**Travel:**

Occasional

**Equipment Used:**

Computer printouts, incoming mail, real estate and consumer loan applications, loan documents, calculator, computer terminal, copy machine, fax machine, various software programs.

**Other Position Requirements:**

Contacts: This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

Confidentiality: This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.
- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

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This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

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**Employee Name (please print)**

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**Signature of Employee**

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**Date**