



**Position:** Teller Supervisor  
**Reports To:** Retail Operations Supervisor  
**FLSA:** Exempt  
**Location:** Oversight over Idaho, Meridian, and Whitefish offices

### Position Summary

The position of Teller Supervisor will provide general oversight to the Bank's day-to-day Teller (including ITM) operations and systems in accordance with the organization's Mission Statement and Core Values including the Advantage Business Model. The Teller Supervisor will oversee performance standards for all tellers at all locations, manage the scheduling to ensure we have adequate staffing at all times, and meet our exceptional customer service standards. This person must have the ability to communicate effectively while working quickly and with accuracy. This position will also have direct contact with customers, team members and vendors for system troubleshooting, maintenance, and re-supply and must interact in a professional and courteous manner. Must conduct themselves in a manner that will enhance the overall efficiency and image of the bank. This position will actively support all Bank sponsored community events and promote Bank products and services. The position reports to the Retail Operations Supervisor.

### Essential Functions

- Oversight of all Teller operations to include:
  - Tellers – both systems and team members.
  - Interview, hire, mentor, train, and discipline as needed.
  - Resolve personnel issues by asking for assistance as needed from the Retail Operations Supervisor.
  - Maintain Teller supplies inventory; including a list of where items are ordered and how to order.
  - Manage all Teller cash levels per the Bank's policy. (i.e. ATM, Vault, TCR, ITMs, ITM cash Teller cash exposure).
  - Review and log Regulation CC holds to be reviewed by Compliance Committee monthly
  - Respond to and follow up timely on customer comments and complaints, providing necessary feedback to Tellers.
  - Order and ship funds to the Federal Reserve.
  - Prepare management reports and memos.
  - Oversee all Teller cash control processes.
  - Write and update Teller procedures as needed.
  - Retain Teller-related record items per retention guidelines.
  - Oversee security and dual control procedures.
  - Demonstrates and understands the importance of:
    - Dual control
    - Customer confidentiality
    - Locking workstations
    - ID/Verifying customers
    - Product knowledge of online banking and mobile check deposits
    - Reading account and customer alert messages every time and understanding the importance of them
- Coaching:
  - Promote Kasasa – our primary deposit product.
  - Follow up on all performance-related items (i.e. non posts, hold exceptions, OFAC, teller differences, and timely completion of education).
  - Acknowledges customers right away and demonstrates appropriate conversation while

helping customers in person and on the phone

- Maintain knowledge of Banking compliance and regulatory standards.
- Direct supervision of Teller staff.
- Schedule and conduct required yearly performance reviews and quarterly check-ins.
- Monitor and set performance measurements and goals.
- Maintain proper staffing levels based on volume, scheduling needs for training, time off, and meetings.
- Ensure proper training is provided to all Teller staff.
- Be proactive in communicating to team members about any procedural changes, compliance, and regulatory findings.
- Maintain knowledge of banking products and services to cross sell to customers.
- Provide exceptional customer service while maintaining compliance with Bank regulations, rules, and procedures.

#### **Additional Responsibilities**

- Operating a teller window when needed, i.e., vacations or illness of team member.
- Ability to backup as ITM, Teller, and CES role as needed.
- Assisting with Career development planning.
- Monitor all teller and drive-up equipment researching best options and making recommendations when upgrades or replacements are needed.
- Assist SVP of Operations in setting and managing a yearly budget for department education and equipment.
- Complete required education and compliance training annually.
- Membership in various Bank committees.
- Provide input into policy setting.
- Approve/authorize customer transactions as needed within the approved authority level.
- Adherence to the Advantage Business Model and being Montana Tough.
- Participate in Heritage Club, Highlander Track, and other Bank-sponsored community activities with a goal of participation in 6 or more activities annually.

#### **Skills and Competencies**

- Prefer banking experience focused on deposits and operations.
- Beneficial to have overall banking exposure (lending, accounting)
- Problem-solving ability – able to resolve problems and proactively develop solutions.
- Must be bondable.
- Computer proficiency required – the ability to use the internet, email, and Microsoft Office Word and Excel.
- Must be able to conduct oneself in a manner that promotes trust in the individual and our organization.
- Must always maintain confidentiality due to the nature of information about customers and transactions.
- Work cooperatively and respectfully with all Bank Team Members.
- Self-directed – must be able to fulfill the responsibilities of the position with minimal supervision.
- Must be able to prioritize and organize responsibilities to maximize productive results.

#### **Physical Demands**

- Normal office environment.
- Extended PC viewing, keyboarding with periods of sedentary work
- May be required to stoop, kneel, stand, walk, talk, hear, reach with hands and arms.
- May be required to occasionally lift/move up to 30 pounds
- Travel is required within market area.

The physical demand notes above are representative of those that must be met by an employee to successfully perform the essential function of the position. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

Team Member Signature    Date \_\_\_\_\_

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Team Member Printed Name