

Job Description: **Treasury Management Specialist**

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| Department: Sales | Reports to: VP, Retail Banking |
| Status: Full- Time/ Exempt |  |

**Job Summary**

Primary focus is calling on business owners throughout the Bank Midwest footprint to sell electronic banking services and to grow commercial deposit account relationships. Will develop new customer relationships while maintaining a strong relationship with current customers to ensure great service and complete customer satisfaction.

**Responsibilities and Accountabilities**

* Partner with lenders, retail bankers, agents and advisors to prospect for new commercial account customers and to pursue existing customer relationships through scheduled appointments and sales presentations
* Develop and implement an electronic banking sales strategy that includes objectives, measurable goals, and activities to acquire, retain, and expand commercial account customer relationships.
* Meets with business clients and prospects to uncover needs and present solutions.
* Prepare and deliver product presentations and demos.
* Make qualified referrals to lending, insurance, and wealth management.
* Establish rapport and build trust to create customer loyalty and long-term relationships.
* Provide documentation support to other team members as needed and assist with customer service needs.
* Promote and have knowledge of all Bank Midwest products and services.
* Partner with Channel Delivery Support in the development and pricing of electronic banking solutions that will attract and retain customers, increase competitiveness in our market locations, and generate revenue for the company.
* Partner with Marketing to develop business communication and sales collateral.
* Network and stay abreast of business / industry / customer trends in terms of new business opportunities. Be alert for and refer any potential new business or opportunities to the banking, investment, trust, or insurance departments.
* **Customer Relationship Manager for all Cash Management/RDA customers, which represents our largest concentration of depositors.**
* **After hour availability for all Cash Management/RDA customers.**

**Training/Mentoring Responsibilities**

* **Responsible for training and compliance for all Cash Management/RDA customers.**

**Other Duties**

* As a part of the overall team of bank employees, this position may be requested to assist in the support of other bank activities.
* Will have extensive contact with the public and conduct relationships in a manner that will enhance the overall image and marketing efforts of the bank.
* Participate in outside civic activities that enhance the bank, personal growth, and the community.
* Accept other duties as assigned- This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position.
* Adhere to all company policies including, but not limited to, Bank Midwest Code of ethics Policy for personal conduct, confidentiality, conflicts of interest, outside activities, and reports of misconduct.
* Responsible for loss prevention and security efforts according to this position.

**Required Competencies**

* Sales
	+ Proven business development skills, selling, negotiating, and closing skills. Has an entrepreneurial spirit, with strong client, quality and results orientation.
	+ Be able to set measurable goals and plan and execute short term and long-term sales strategies.
	+ Have a strong customer focus, be self-motivated, and enjoy meeting new people.
	+ Requires excellent organizational skills with the ability to meet deadlines and manage time effectively.
* Analytical
	+ Ability to analyze business / financial data, develop innovative solutions, and communicate to prospects/clients in a simple and effective manner.
* Communication
	+ Excellent verbal, written and executive presentation skills.
	+ Ability (both written and oral) to express thoughts and ideas effectively; and actively listen to others.
	+ Handle all customer and company information in a confidential manner.
* Customer Service
	+ Understand the role of sales and customer service in a community bank and retail environment.
	+ Respond sensitively to the needs and priorities of the customer (both internal and external);
	+ Establish an effective working relationship with customers to gain their respect and loyalty.
* Technological Skills
	+ Fully understand electronic banking products and be able to interpret applicable rules and regulations.
	+ Proficient with Microsoft Word, Excel, Power Point and Outlook.
	+ Competent in internet usage and be able to use a PC to extract information form core systems.
* Adaptability
	+ Adjust quickly to different work situations; remain composed under pressure and in stressful situations.
	+ Exercise independent judgment with minimum supervision.

**Behavioral Expectations**

* *Be Authentic*
* *Live Graciously*
* *Be a Life-Long Learner*
* *Have courage*
* *Take Ownership*

**Qualifications**

* Bachelors Degree in related field of banking, marketing, or business administration preferred.
* Requires a minimum of 3 to 5 years sales experience, plus strong banking knowledge and understanding of electronic banking services.

**Physical Demands/Work Environment**

* Prolonged periods of sitting at a desk and working on a computer.
* Must be able to lift up to 10 pounds.
* This position does require occasional travel.

Updated/Approved by: Date: 1/11/21