

## Customer Service Representative

### Summary

Northwest Bank serves the business and professional communities of Idaho, Oregon and Washington. We were founded in 2008 on the idea that experience and exceptional service matter and should be expected, and that banks should be strong partners with their customers in finding creative financial solutions that work.

To achieve that goal, we need great people on our team. People who share that vision and our values, who know their customers and work hard for their benefit, and help the whole team succeed.

### About this Position:

The Customer Service Representative (CSR) supports the Bank's customer service model by providing exceptional customer service, maintaining quality relations with existing customers, recognizing cross-selling opportunities, and performing new account, teller and branch operation functions. This position is responsible for supporting the Customer Service Manager and Relationship Managers (RMs) with the promotion and implementation of treasury management products and services. The CSR executes job functions while complying with mandatory regulatory requirements and Bank policy.

This position reports to the Customer Service Manager, and is located in Lake Oswego, OR.

**Are you right for this position?** Being a great Customer Service Representative means providing the Bank's customers with timely, responsive and exceptional service in accordance with the Bank's mission, vision, core values and customer service standards.

In this position, you will:

- Open new deposit accounts ranging in complexity from simple personal accounts to complex business accounts; obtaining required information from customers
- Coordinate and implement depository account transitions from previous customer financial institutions into the Bank by gaining necessary written approvals in the form of depository services agreements and signature cards and providing regulatory disclosure within preset Bank policy
- Provide routine assistance to a portfolio of customers via telephone, in person, and at the customers' place of business regarding inquiries ranging from very basic account questions to complex treasury management solutions
- Maintain an in-depth knowledge of all treasury management products and services; provide treasury management consultation to customers and RMs in order to facilitate depository services for business customers
- Conduct on-site customer product training to include; ACH, online banking, security administration, wire transfer, Remote Deposit Capture; educate and train treasury management customers in the risks and requirements of treasury management services
- Assist customers in processing financial transactions in accordance with established policies and procedures

- Initiate sales and service activities designed to retain existing relationships and enable growth of new relationships; take advantage of opportunities outside the bank to generate sales leads and increase the banks visibility
- Maintain a high degree of accuracy while boarding account and customer information into various systems
- Maintain knowledge of and compliance with banking regulations
- Maintain a high degree of confidentiality with customer information
- Scrutinize checks, cash and customer identification for authenticity to protect the Bank and customers against fraud losses

#### **Minimum Qualifications**

- High school diploma or general education degree (GED); and 2-5 years of experience in banking and/or related field
- Strong customer service and interpersonal skills
- Proven ability to cross-sell bank products and services
- Thorough knowledge of deposit services and other banking services
- Thorough knowledge of deposit policies and procedures
- Computer skills including Windows-based software, word processing and spreadsheet applications, internet usage, electronic mail, and bank software
- Effective oral and written communication skills
- Able to work with minimal supervision

If this sounds like the right position for you, please send a cover letter and resume to [heidi.wiencken@northwest-bank.com](mailto:heidi.wiencken@northwest-bank.com).