

Service Development Specialist - Job Standards

Job Standards include: (Note: this is a representative list only - complete list provided with purchase)

KNOWLEDGE OF WORK:

Understands background knowledge, techniques, principles, technical disciplines, procedures, etc., required for effective position performance
Knows how to process all requests for new loans, deposit accounts, and all other organization products and services, and can complete all paper and system documentation necessary for handling such transactions
Knows and understands all policies and procedures relating to organization services, and can apply them in both routine and extraordinary circumstances
Knows how to use the data system to process all customer requests for new business in both the deposit and lending areas
Knows how to gather information from customers regarding new business requests (i.e. take loan applications, open new customer accounts, etc.), and prepare such information for review and action by account representatives
Knows how to prepare appropriate business development reports for management review (i.e. daily sales summary, daily activity report, etc.)
Possesses sufficient knowledge about account representative and receptionist duties to back these positions up effectively as needed

QUALITY OF WORK:

Effectively and thoroughly applies position knowledge. Demonstrates reliability and accuracy in work performance
Quotes interest rate, monthly payment, dividend rates, and product information correctly. Asks all customers requesting information for their business (i.e. asks to take a loan application, open a new certificate, etc.)
Accurately records all information needed to process new business requests
Prepares all loan and new account documentation accurately, completely, and in an organized manner
Secures all required information needed to correctly open new deposit account relationships with the organization

QUANTITY OF WORK:

Responds to all customers calling the organization with new business requests in a timely manner; usually within the hour, but no later than the same business day
Is a productive worker who moves from task to task in an organized manner
Able to handle multiple tasks consecutively with accuracy and thoroughness
Does not let work "lie around." Accomplishes priority tasks, yet also sees that lower priority items are completed on a timely basis

PROFESSIONALISM:

Presents an image in manner, dress, language and knowledge that enhances self-image
Subscribes to the theory of professionalism as an "attitude" and an "ethic" demonstrated in practice
Personal deportment (i.e. dress, manner, etc.) always at standard. No deviations
Treats all customer business and information (positive or negative) as completely confidential.
Discloses information only as required by legislation or organization policy
Promotes goals and aims of the organization
Ensures that position and power is never compromised by reason of friendships, conflict of interest or otherwise