

CSR (Customer Service Representative)

Stoughton, MA

Envision Bank believes in people helping people – it was our belief when we first opened our doors in 1851 as Randolph Savings Bank, and it holds true today. For over 150 years, we have been providing individuals, families, homeowners, and businesses in our community a wide variety of products that are convenient and hassle-free.

We're employee owned, and customer experience driven. We care, and we need people who care as much as we do. We are part of the communities in which we live. Relationships matter. We strive to make things simple and get things done. If this sounds like you, please read on . . .

Position Summary:

Customer Service Representatives demonstrate a passion for helping customers and building relationships through consistent identification of customer needs and the recommendation of Bank products. The CSR provides a superior customer experience through the effective delivery of products and services in order to earn new bank relationships as well as expand existing ones. The CSR will also become involved in the community by volunteering and participating in local organizations. Performs all tasks in compliance with established Bank policies and procedures, with Federal and State laws and with all Fair Lending regulations.

Primary Responsibilities:

1. Sales

- The CSR focuses on acquiring, expanding and maintaining customer relationships by using the organization's established sales process. This will include both working with customers in the bank lobby as well as going outbound (in person and via telephone) to help develop new consumer and business relationships.
- Partners with other business units to achieve established production goals.
- Focuses on relationship building by determining customers' needs then identifying and recommending appropriate bank products and services.
- A strong focus on product knowledge is a must. This will allow the CSR to accurately and efficiently complete account documentation and obtain proper authorizations.

2. Operations

- Adheres to Bank policies and procedures and performs functions in compliance with all rules and regulations. Updates security and regulatory information through regular training.
- Creates friendly, positive interactions with customers and provides effective product and service resolutions to customers.

3. Community Involvement

- Actively participates in community activities and organizations in order to promote the Bank's brand and CRA achievements.

Other Responsibilities:

The above is a description of the ordinary duties of the position. It should be expected that from time to time other duties [both related and unrelated to the above] may be assigned and are therefore required.

Position Requirements:

- Requires a Bachelor's Degree or equivalent or three (3) years' retail sales experience
- Must possess strong motivation to meet and exceed sales goals while keeping excellent customer service at the center of everything they do
- Must be able to manage a territory and have strong prospecting and closing skills
- Must have strong presentation skills and possess a self confidence when developing new client relationships
- Must have a strong base of product knowledge
- Ability to accurately process computer transactions.

Physical Demands/Conditions: General office environment, with perhaps some local travel. Some lifting (up to 50 lbs) and bending required. Ability to hear and communicate with others.

Equipment Used: General office equipment, including but not limited to, computer, fax machine, calculator, multi-line phone, copier, and data projector.

Supervisory Scope: None

At Envision Bank **PRIDE** is the foundation of who we are and what we strive to be. If you possess a **P**assion to win, are **R**elationship-driven, thrive in an environment of **I**nnovation and continuous learning, believe in **D**oing the right thing, and are interested in **E**ngaging with a collaborative team, then we want to get to know YOU better!

Apply today at <https://envisionbank.applicantstack.com/x/apply/a2clvbs7neay>

Envision Bank takes pride in being an Equal Employment Opportunity employer and seeks to create and maintain a vibrant diverse workforce. Equal Opportunity Employer – minorities/females/veterans /individuals with disabilities/sexual orientation/gender identity are strongly encouraged to apply.