



**POSITION TITLE:** Greeter/ Receptionist (Part Time)  
**REPORTS TO:** Retail Branch Manager  
**SUPERVISES:** None  
**STATUS:** Non-Exempt  
**EFFECTIVE:** October 2020

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**GENERAL POSITION SUMMARY:** The role of the Greeter/Receptionist is to provide a friendly welcome and acknowledgment to members, guests, and vendors, as they enter the Credit Union and thanking them as they exit. The Greeter/Receptionist will control the number of guests entering the Credit Union, for proper social distancing, through a secure door. The Greeter/Receptionist will perform light cleaning & sanitation during down times, to assure door handles and other high traffic areas remain clean. Additionally, the Greeter/Receptionist may perform a variety of back-up duties related to teller work, including receiving and handling of deposits, checks and payments. The Greeter/Receptionist completes staff and member requests in a timely, professional, courteous, and efficient manner.

**ESSENTIAL FUNCTIONS:**

- Greets members and guests in a friendly, professional, and hospitable manner of conduct and dress in accordance with the position.
- Monitors the main entrance to control population in and out of the branch, allowing for proper social distancing.
- Monitors physical security of lobby and branch to promote safety and security.
- Manages lobby traffic and directs members and guests to appropriate person(s) or location(s).
- Ensures lobby, work area, reports, correspondence, and records are neatly and accurately maintained to present a favorable image of Point West Credit Union.
- Assists with the security of the member/guest area – locking and unlocking of doors, turning lights on or off, etc.
- Represents the credit union to members in a professional manner. Provides prompt, efficient, confidential, and accurate service to members and fellow staff members.
- As needed, answers questions regarding credit union products and services. Assists members with starting application to product or service (e.g. Visa Application, Online Banking, etc.)
- Attends and actively participates in staff and departmental meetings.
- Perform other duties as assigned by the Branch Manager

**NON-ESSENTIAL FUNCTIONS:**

- Aids with other duties as assigned; photocopying, faxing, filing, stuffing envelopes, making new member packets and distribution of information/documents when needed.
- Performs bi-weekly inventory of branch supplies and reports needs to the Executive Assistant for order.
- Disseminates credit union material to current and prospective members.



**SUPERVISORY RESPONSIBILITY:** None

**STANDARD JOB SKILLS:**

1. Judgment: Continually uses sound judgment, as outlined in:
  - a. Employee Handbook
  - b. Code of Ethics
  - c. Promises
2. Regulatory Knowledge:
  - a. Solid knowledge of credit union operations and philosophy required.
  - b. Thorough knowledge of credit unions products and services to effectively determine members' needs and cross-sell products/services.
3. Change Management: Is flexible, easily adapts to change; and promotes/assists with change in the work environment. Has ability to prioritize and manage multifunctional tasks and projects.
4. Analytic Ability: Requires the ability to apply principles of logic to define problems and desired outcomes, collect data, establish facts, and draw valid conclusions from multiple sources of an objective and subjective nature.
5. Interpersonal Skills: Strong emotional intelligence necessary to build effective partnerships with potential members, members, staff, management, volunteers, and vendors.
6. Active Listening: Requires the ability to effectively listen and ask open-ended and clarifying questions for needs-identification.
7. Initiator. Acts independently with minimal direction.
8. Time Management: Strong ability to:
  - a. Organize and set and meet deadlines
  - b. Prioritize
  - c. Multi-task
  - d. Leverage resources
  - e. In attention to detail
9. Verbal and Written Communication: Excellent speech and accurate writing, stressing composition and grammar, and the ability to clearly convey intended information.
10. Public Speaking: Ability to confidently and effectively present and facilitate before an array of audiences.
11. Sense of Urgency/Strategic Thinking: An energetic, forward thinking, and creative individual who proactively seeks efficient processes and effective methodologies to improve safety and soundness of the credit union.
12. Technical Skills: Savvy with a vast array of computer programs and office equipment. Advanced proficiency in member operating systems. Strong attention to detail, utilizing electronic tracking systems and methods.
13. Confidentiality: Demonstrates a high level of confidentiality, sensitivity, and tact.
14. Demeanor: Ability to maintain a professional and accessible profile with all contacts.

**SPECIFIC JOB SKILLS:**



- Exceptional member service; approach members and guests with a friendly, engaging & compassionate manner.
- Strong well-developed interpersonal oral and written communication skills to determine existing and/or potential member's needs and to communicate ideas effectively.

#### **EDUCATION AND/OR EXPERIENCE:**

- High school diploma or equivalent required.
- Courses related to member service, telephone skills, and interpersonal skills preferred.
- A minimum of two years previous experience in a customer/member service position preferred.

#### **PHYSICAL/MENTAL DEMANDS:**

##### **(Physical demands)**

- Continuous standing and walking for extended period when performing duties.
- Occasional lifting up to 35 lbs. (office supplies).
- Occasional bending, squatting, or reaching at ground level.
- Frequent use of hands in repetitive tasks such as simple grasping, twisting/turning of wrists; finger dexterity.
- Continuous speaking and hearing for interaction with staff, members, and outside contacts.
- Continuous ability to see close and at a distance.

##### **(Mental demands)**

- Continuous interaction with others, repetitive work, attention to detail, ability to solve complex problems, alertness, precision, concentration, accuracy, thoroughness, and memory demands.
- Occasional fast-paced work
- Frequent deadlines, flexibility, performing basic and complex numeric calculations, writing, reading, comparing, analyzing, judgment, reasoning, patience and negotiating.

#### **WORKING CONDITIONS:**

- Part Time 20-hour work week
- Exposed to a potentially hazardous condition, i.e. robbery. Receives detailed instructions and procedures to be followed to minimize the risk.

The physical/mental demands and work environment characteristics described above are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.



**NOTE:** Point West Credit Union believes that each employee makes significant contributions to our success. That contribution should not be limited by the assigned responsibilities. Therefore, job descriptions are not intended, and should not be construed to be exhaustive lists of all responsibilities, skills, efforts or working conditions associated with a job. They are intended to be accurate reflections of those principal job elements essential for making a fair pay decision about jobs. It is our expectation that each employee will offer his/her services wherever and whenever necessary to ensure the success of our endeavors. Nothing in this position description is an implied contract for employment. The functions are not all encompassing and are subject to change at any time by management.

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