



Position Title:	Retail Operations Specialist
Date:	February 25, 2025
Department:	Retail Banking
Location:	Oklahoma City
Supervises:	None
Reports To:	Director of Retail Banking
FLSA Status:	Non - Exempt
Pay Range:	

Summary of position:

As the Retail Operations Specialist, this individual provides accurate and positive feedback while performing a variety of administrative functions. This position supports all positions within the Retail Banking group, including the Director of Retail Banking and the Director of Operations. Retail Operations Specialist will be responsible for managing and maintaining the deposit exception tracking program as well as serving as primary resource for the new account function, among other responsibilities. This position requires thorough knowledge and familiarity with the products and services utilized by the Bank.

Key job functions: (Includes current duties, primary objectives, and responsibilities which are critical to the successful performance of the position)

- Provides prompt, efficient, and accurate service in response to requests, inquiries, or problems concerning operational services provided by the Bank.
- Conducts output verification of daily maintenance and new accounts to ensure all details of the account are reflected accurately on the system.
- Reviews holds placed daily to ensure accurate information as well as archived documents are correct.
- Maintains a thorough working knowledge of all systems used to include Teslar, Fiserv Premier and Director.
- Maintains a thorough understanding and knowledge of the required documents for each account type opened to include both consumer and business accounts.
- Serves as a primary resource for assisting branch staff for any account needs including opening, maintenance, closing, etc.
- Maintains updated knowledge with any compliance related to the new accounts area.
- Ensures all deposit account documents have been archived.
- Reviews exception tracking daily to ensure timely completion.
- Prepares weekly reports and communicates those findings to frontline employees weekly.
- Communicates effectively to frontline employees on outstanding needs.
- Other duties as assigned.

Qualifications:

- Excellent organizational skills.
- Excellent client service skills.
- Extensive knowledge and familiarity of the services and products offered by the bank.
- Proficient computer skills.
- Friendly, outgoing, assertive, enthusiastic personality.
- Professional appearance and actions.
- Exceptional interpersonal and communication skills
- Strong analytical skills to measure effectiveness and efficiency
- Demonstrated ability to lead

Education and Experience:

- Bachelor's degree preferred
- Five years of retail banking experience required. Three years minimum in a new account role.

Travel:

- Travel to the different branches may be needed.
- Travel may include overnight stays

Physical Demands: These physical demands are generally representative of the position.

- Hearing, speech, close vision
- Sitting, including computer use
- Driving with own transportation to other branches for meetings/workshops
- On occasions, may be required to lift and/or move up to 25 pounds
- Job responsibilities may include standing, walking, lifting, kneeling, and crouching

Sovereign Bank is an Equal Opportunity Employer