



Deposit Account Trainer

DEPT: Training

REPORTS TO: Chief Administrative Officer (CAO)

CLASSIFICATION: Non-Exempt, Full-Time

Position Summary:

The Deposit Account Trainer is responsible for delivering technical training for Tellers and Universal Bankers in a classroom and/or on the job environment; developing and administering core curriculum including legal and regulatory, professional and behavior standards, sales and service, product knowledge and technical knowledge; assessing training needs and assisting in individual development plans, scheduling training activities; providing one-on-one coaching and continuing support, assisting with the lead administrative management of the Business Process Manager (BPM) software.

Duties and Responsibilities:

1. Create, develop, and present a frontline training program that includes cash handling, transactions, teller compliance, customer service, use of computer software, etc.
2. Create, develop, and present training programs emphasizing the functional use of Business Process Manager (BPM) and detailed procedures for opening all River Bank deposit account types.
3. Plan, coordinate, and facilitate new hire orientation that includes an introduction to the bank's mission and values as well training on essential policies, procedures and compliance standards for all new employees.
4. Assist the BPM Administrator with monitoring, maintaining, and testing BPM software for effective and efficient performance. Reviews software release documentation and completes required updates accordingly and collaborates with the CAO and Retail Banking Manager to confer on implementing and communication prior to staff launch. Compiles and documents software deficiencies as discovered and communicated by staff.
5. Create and develop appropriate job aids, learning activities, learning evaluations, and written procedures.
6. Assists with coverage as needed to accommodate staffing and training throughout the bank. Also serves as the primary back-up to the Account Review Specialist.
7. Monitor and document new employee training from their first day of training through the completion of their initial probationary period.



8. Evaluates training and provides feedback and recommendations to CAO and Retail Banking Manager.
9. Coordinates presentation materials for Bank All Training events with the CAO and Retail Banking Manager.
10. Assists with setting up and supporting a variety of presentations (Microsoft Teams, PowerPoint, Training Equipment, etc.)
11. Assists with setting up and managing the training library resources such as BAI and Bank-A-Count, etc., and researching current training trends and alternative materials.
12. Assists management by completing and communicating various training reports for management to develop performance assessments and plans.
13. Assists in monitoring of account documentation for accuracy and compliance with bank policies and procedures.
14. Stays current with compliance and product knowledge serving as a resource to frontline staff and assists with fielding questions.
15. Maintain knowledge of River Bank's products, services, policies, and procedures to provide effective customer service training.
16. Actively contributes to an encouraging and positive working environment for all employees and customers.
17. Ensures confidentiality of all information, including both customer and employee related.
18. Participate in reviewing and validating all Account Maintenance Forms for accuracy and completion, and tracks findings.
19. Assists the Account Review Specialist and BSA Officer with providing training on discrepancies identified in the account review process.
20. Other duties as assigned.

Requirements:

1. High School diploma or GED.
2. 3-5 years related banking or training experience.
3. Ability to work effectively in an internal/external customer service environment requiring both face-to-face, phone-based support, and relevant technologies.
4. Strong problem-solving skills.
5. Ability to work independently and meet deadlines.
6. Ability to work well with others and contribute to a positive work environment.
7. Excellent organizational, time management, and communication skills.
8. Excellent and enthusiastic presentation and interpersonal skills.
9. Strong computer skills.



Desired Knowledge, Skills, and Abilities:

1. Associate degree in Finance or related field.
2. Ability to make independent, timely decisions in a fast-paced environment.
3. Ability to remain flexible and adapt to changes in the work environment.
4. Develop excellent leadership skills.